

MCP SERVER

NO CODE

CLOUD HOSTED

# Agile CRM MCP for AI Agents

Manage contacts, deals, and tasks directly from your sales pipeline data

Agile CRM MCP gives your AI agent full access to your sales data. Manage contacts, audit deal pipelines, schedule follow-up tasks, and pull client history—all through natural conversation with no need to jump between tabs or open the web app.

**A+** Quality Score 100/100

contact-management

deal-tracking

marketing-campaigns

task-automation

unified-crm

business-automation



# The infrastructure that powers AI agents in the real world.



Vinkius connects AI to the world's software through secure, enterprise-grade infrastructure — enabling real-world execution at scale, built on the Model Context Protocol (MCP).

# Your AI Connections Run Through Vinkius Cloud

The world's largest  
managed MCP catalog

Vinkius is the cloud infrastructure where AI agents connect to the software your business already runs. We handle the hosting, the security, the credentials, the uptime — you get agents that actually do things.

We operate the world's largest managed MCP catalog. Major SaaS platforms, CRMs, databases, and cloud providers — running, monitored, production-ready. This MCP server is hosted and maintained by the Vinkius Cloud for AI Agents.

*The agent doesn't manage credentials, doesn't manage uptime, doesn't manage security. Vinkius does.*

— Architecture principle

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## Four Pillars of the Vinkius Runtime

### 01 — Security by design

Credentials stay encrypted at rest via AES-256. The AI agent never touches raw keys — they're injected into a sandboxed V8 isolate at runtime. Actions are logged, and connections have an emergency kill switch.

### 03 — Deterministic observability

Eight immutable metrics per endpoint: request volume, p95 latency, error rate, active connections, cost attribution. A live payload feed logs every tool call with mutation detection.

### 02 — Built on MCP Fusion

This MCP server was built with **MCP Fusion**, the open-source framework (Apache 2.0) that powers the entire Vinkius catalog. Schema-as-firewall strips undeclared fields, compiled PII redaction runs at zero overhead, and cryptographic lockfiles produce git-diffable audit trails.

### 04 — Autonomous operations

Servers are deployed, monitored, and patched autonomously. New capabilities and security patches ship weekly. Zero-downtime deployments ensure continuous availability across all managed MCP servers.

**AES-256**

Encryption at rest

**Ed25519**

PKI vault signatures

**24h TTL**

Ephemeral session keys

**V8 Isolate**

Sandboxed execution

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## One Token. Instant Access.

Every MCP server on Vinkius is accessed through a **Connection Token**. Tokens are generated in the cloud dashboard and produce a unique MCP endpoint URL. Paste this URL into any MCP-compatible client — no SDK required.

A single token can serve **multiple AI clients simultaneously**, or you can issue separate tokens per client for granular access control. Each token tracks its own request count, last activity timestamp, and can be individually enabled or revoked.

MCP ENDPOINT

`https://edge.vinkius.com/{token}/mcp`

Claude



Cursor



VS Code



Windsurf



Grok



Gemini

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## Security Is the Architecture

Security in Vinkius is not a feature — it's the foundation of the runtime. The gateway enforces multiple independent protection layers between AI agents and third-party APIs.

**01 — Ed25519 PKI Vault**

Every workspace has an Ed25519 Master Key. Session keys are generated ephemerally (24h TTL) and signed by the Master Key. Credentials never leave the vault boundary.

**02 — V8 Isolate Sandboxing**

Tool code runs inside isolated-vm V8 isolates with 64 MB memory caps and per-request timeouts. No filesystem access, no network access except through the SSRF-guarded fetch bridge.

### 03 — SSRF Guard

All outbound HTTP requests are DNS-resolved and validated before execution. Private IP ranges (10.x, 172.16-31.x, 192.168.x, AWS metadata 169.254.x) are blocked at the network layer.

### 05 — Cryptographic Audit Trail

Every request is signed into a SHA-256 hash chain with Ed25519 signatures. Events form a tamper-proof, SIEM-exportable forensic record.

### 04 — DLP & PII Redaction

A ResponseGuard pipeline intercepts every tool response. Configurable redaction patterns strip sensitive fields (emails, SSNs, card numbers) before data reaches the AI agent.

### 06 — Honeypot Trap System

Phantom credentials are injected into isolated environments. If a honeypot is used outside Vinkius infrastructure, the server is quarantined instantly.

## Emergency Kill Switch

EU AI Act Art. 14(1)  
Compliant

The kill switch is an **emergency halt** mechanism — not a simple toggle. When triggered, it executes three actions atomically:

#### 01 — Server deactivated

The MCP server is immediately taken offline across the entire cluster.

#### 02 — All tokens revoked

Every connection token is invalidated. Total lockout — reconnection blocked until new tokens are issued.

#### 03 — WebSocket connections killed

Active connections terminated via Redis pubsub broadcast. Propagates to every runtime node in the cluster.

## Full Visibility. Zero Guesswork.

The Vinkius cloud dashboard includes a full MCP Governance suite — real-time analytics and security controls for production AI operations.

**Control Plane**

KPI dashboard with request volume, latency, success rate, token consumption, and AI-generated operational briefings.

**FinOps**

Cost tracking per tool, payload compression savings, budget optimization signals, and consumption trends.

**Firewall & DLP**

PII redaction activity, sensitive data protection counters, and security event timeline.

**Agent Activity**

Which AI clients are connecting, how often, and what they're doing — real-time session tracking.

**Tool Health**

Slowest and most error-prone tools, with actionable root-cause insights and performance baselines.

**Incident Log**

Error trends, failure rates, status-code breakdowns, and forensic audit trail access.

Get started at [cloud.vinkius.com](https://cloud.vinkius.com) — connect your AI agent in under 60 seconds.

# Agile CRM MCP

4 tools available

Cloud-hosted on Vinkius

Managing a large client base means constantly checking details across multiple dashboards: who needs a follow-up? Where did that big deal get stuck? What was their last interaction?

This MCP lets your AI agent handle those business interactions directly through your chat interface. You can use it to search for contacts by email, list out all active sales deals, or even pull up tasks due this week—all without leaving the window you're talking in. It means your agent keeps track of contact profiles and helps organize everything from pipeline stages to custom tags.

If you're already using services like Vinkius for other integrations, adding Agile CRM gives you one place to talk to your data. You can quickly check a client's full history or identify which deals are overdue, letting you focus on selling instead of clicking through menus.

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## Core Capabilities

### 01 — Search and retrieve contact information

You can search for specific people by email address to pull up their profile details.

### 03 — Audit and view sales opportunities

You can list out existing deals to check their current status, worth, and pipeline stage.

### 05 — Identify high-value accounts

You can pull technical metadata to help identify which opportunities are the most valuable right now.

### 02 — List all known contacts

This function pulls a complete list of every contact stored in the CRM.

### 04 — Manage follow-up tasks

This tool lets you retrieve a list of scheduled CRM tasks or create new ones for your team.

# One Click on Vinkius — From Prompt to Execution

Available at [vinkius.com/mcp/agile-crm](https://vinkius.com/mcp/agile-crm) — connect your AI agent in three steps.

- 01 Subscribe to this MCP and provide your Agile CRM Domain, Email, and REST API Key.
- 02 Connect your preferred AI client (Claude, Cursor, etc.) through the Vinkius Marketplace.
- 03 Talk to your agent using plain language; it will perform actions like listing deals or searching contacts.

The bottom line is that you talk to your CRM data as if it were a colleague sitting next to you.

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## Built For

Sales Development Reps and Account Managers who spend too much time switching between the CRM, email, and task list. It's for anyone whose day is spent chasing details on client history or updating pipeline statuses manually.

### Account Manager

Uses this MCP to look up specific client histories or create follow-up tasks immediately after a call, logging all necessary data without leaving their chat.

### Sales Development Representative (SDR)

Runs searches by email on cold leads and pulls deal lists to quickly qualify prospects before passing them off to an Account Manager.

### Marketing Manager

Checks contact lists and audits segment tags using this MCP, getting a quick summary of who needs specific campaigns or attention.

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## What Changes When You Connect

- 01 Stop context switching. Check a client's full history or list active deals instantly through natural chat conversation.
- 02 Keep your team accountable. Use the task listing to ensure no follow-up is missed, keeping all required action items centralized.

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- 03 Speed up prospecting. By searching for contacts by email, you can pull up necessary data on a prospect immediately without leaving your workspace.

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  - 04 Maintain visibility across deals. Auditing sales opportunities lets you see exactly which parts of the pipeline are stalled or high-value.

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  - 05 Save research time. Instead of opening multiple tabs to gather client info, use this MCP to get historical interaction logs directly.

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## Real-World Applications

### A lead needs vetting before a meeting

An SDR uses the agent to search for contact by email. The system retrieves all historical logs and lists deals, giving the rep everything they need on one screen to prepare for the call.

### End-of-week pipeline audit

The Account Manager asks the agent to list deals worth over \$10k. The system filters the opportunities and provides a summary, allowing the manager to quickly identify potential revenue bottlenecks for leadership.

### Following up on an old client account

A customer success rep uses the agent to list contacts, finds the client's profile, and then pulls all associated tasks. They can immediately see if any follow-up calls are due.

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## Patterns to Avoid

### Trying to update records via email

#### ✗ AVOID

Copying a contact's name from an email chain and pasting it into the CRM manually, only to realize you missed updating their associated deal status.

#### ✓ INSTEAD

Use `search\_contact\_by\_email` to pull up the correct profile, then use the agent conversationally to update or retrieve related records.

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### Missing critical tasks

#### X AVOID

Relying on manual calendar reminders for follow-ups, meaning important client meetings fall through the cracks because the task was forgotten.

#### ✓ INSTEAD

Ask the agent to `list\_tasks` to pull up all outstanding assignments and ensure your team stays current.

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### Forgetting deal context

#### X AVOID

Opening a lead's file only to find out which stage they were in or what was discussed three weeks ago, forcing the rep to ask a teammate for help.

#### ✓ INSTEAD

Ask the agent to `list\_deals` and retrieve technical metadata to get an immediate overview of the opportunity's context.

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## The Right Fit

Use this MCP if your sales process relies heavily on cross-referencing data—specifically, when you need to check a contact's history while simultaneously reviewing their active deals or pending tasks. It's ideal for Account Managers and SDRs who work in high volumes of diverse client interactions.

Don't use it if your primary workflow is simply sending mass marketing emails; those are better handled by dedicated campaign tools. Also, if you only need to view contacts without checking their associated deals or tasks, a simple contact directory might suffice. However, because this MCP ties together search (using `search_contact_by_email`), data listing ( `list_contacts` ), and activity tracking ( `list_tasks` ), it's the comprehensive choice for process-driven sales teams.

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## Agile CRM: Managing Contact Profiles with AI Agents

Right now, when you need to know everything about a prospect—their job title, their company size, and who they report to—you usually have to open the CRM portal. Then you click through tags, check the deal history tab, maybe search for related tasks, and finally copy-paste that info into your notes.

With this MCP, you talk to your agent instead. You ask it to find a contact by email, and it pulls everything up instantly. The AI summarizes the necessary details about their profile, saving you from clicking through endless tabs and giving you a clean overview right in your chat.

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## Agile CRM: Auditing Sales Deals with Natural Language

Manually auditing deals means opening the pipeline view, filtering by value, then scrolling through stages like 'Negotiation' and 'Proposal Sent.' It's tedious work that makes it easy to miss a critical opportunity or forget which deal is actually stalled.

Now, you just ask your agent to list out all sales opportunities. You can filter deals based on criteria the AI understands, getting an immediate summary of revenue potential without ever having to click through the complex pipeline view.

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# Agile CRM: 4 Tools for Contact and Deal Management

Use these tools to list all contacts, search by email address, pull deal opportunities, or manage team tasks directly via chat.

#	TOOL	DESCRIPTION
01	<code>list_contacts</code>	Pulls a list containing all contacts stored in your Agile CRM account.
02	<code>search_contact_by_email</code>	Finds and retrieves the full profile for a contact using only their email address.
03	<code>list_deals</code>	Generates a comprehensive list of all sales opportunities currently tracked in your pipeline.
04	<code>list_tasks</code>	Retrieves the current queue of tasks and follow-up items assigned to users or teams.

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# See It in Action

Real prompts you can use once this MCP is connected to your AI agent through Vinkius Cloud.

**U** Show me Jane Smith's details and any open tasks for her account.



### Contact Profile: Jane Smith

- Email: jane.smith@example.com
- Tags: High Value, Follow Up Required
- Last Interaction: 2026-07-15 (Demo Call)

### Pending Tasks:

- [ ] Send Q3 Proposal (Due today)
- [x] Initial Discovery Call (Completed on 07/15)

**U** List all open deals over \$20,000 and tell me their current stage.



### Pipeline Audit Results

DEAL NAME	VALUE	STAGE
Enterprise License	\$75,000	Negotiation
Premium Support Plan	\$22,000	Proposal Sent
Widget Upgrade	\$21,500	Qualified

*Total potential revenue from these deals: \$118,500.*

**U** I need to find a contact who works at Acme Corp.



Found two contacts matching 'Acme Corp':

**John Doe (john.doe@acme.com)**

- Tags: Lead, Cold
- Tasks: None pending.

**Sarah Lee (sarah.lee@acme.com)**

- Tags: Active, High Value
- Pending Tasks: 1 (Follow-up Call due Friday).

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## Frequently Asked Questions

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### 01 How does the Agile CRM MCP help me keep track of leads?

It lets you use your AI agent to search for contacts by email and pull up their full profile, including all historical interactions. This means you get a complete picture of the lead's activity without having to manually check multiple screens in the CRM.

### 02 Can I see which sales deals are stuck or overdue using Agile CRM MCP?

Yes. You can ask your agent to list all active deals and retrieve technical metadata, helping you quickly identify opportunities that have stalled or need attention before they lose momentum.

### 03 Is the task management in the Agile CRM MCP reliable for my team?

Absolutely. Your agent can list current tasks and pending follow-ups for your entire team, ensuring everyone knows what needs to be done next and preventing missed deadlines.

### 04 What kind of contact data can the Agile CRM MCP access?

It accesses comprehensive contact profiles, allowing you to search by email, review tags, and see a full list of contacts within your account. It gives you all the core information needed for outreach.

### 05 Will using the Agile CRM MCP slow down my workflow?

No. By centralizing data retrieval into conversational commands, it cuts down on clicks and context switching. You get answers faster by talking to your agent instead of navigating complex menus.







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# Go Live in 60 Seconds

Get your connection token from [cloud.vinkius.com](https://cloud.vinkius.com), then paste the endpoint URL into any MCP-compatible client.

YOUR MCP ENDPOINT

```
https://edge.vinkius.com/[TOKEN]/mcp
```

CLIENT	WHERE TO CONFIGURE
 <b>Claude AI</b>	Profile → Customize → Connectors → "+" → Add custom connector → Paste endpoint
 <b>Cursor</b>	Settings → Features → MCP Servers → "+ Add New MCP Server" → Type: SSE → Paste endpoint
 <b>VS Code</b>	Ctrl/Cmd+Shift+P → "MCP: Add Server" → add <code>"agile-crm": { "url": "..." }</code>
 <b>Windsurf</b>	MCP Settings → <code>mcp_settings.json</code> → Add endpoint URL
 <b>ChatGPT</b>	Settings → Tools & plugins → Add MCP server → Paste endpoint
 <b>Gemini</b>	Extensions → Add MCP Server → Paste endpoint URL

## ASK AN AI ABOUT THIS

Let your preferred AI explain this MCP server

-  **Ask ChatGPT** 
-  **Ask Claude** 
-  **Ask Perplexity** 
-  **Ask Gemini** 
-  **Ask Grok** 

READY TO CONNECT

# Agile CRM is live on Vinkius Cloud.

Get your connection token, paste it into your AI agent, and start building. No SDK. No deployment. Just results.

[Start at cloud.vinkius.com](https://cloud.vinkius.com) →

[vinkius.com](https://vinkius.com) · [support@vinkius.com](mailto:support@vinkius.com)

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