

MCP SERVER

NO CODE

CLOUD HOSTED

Bexio MCP for AI Agents

Manage CRM, Accounting Records, and Project Oversight in One Place

Bexio brings your entire business management system into conversation with AI agents. Instead of logging into multiple dashboards, you can talk to your agent and have it handle everything: listing contacts, querying invoices, or checking project status directly. It manages CRM, accounting records, and projects all from one chat interface.

A+ Quality Score 100/100

small-business-software

invoicing

project-management

contact-management

swiss-business



The connectivity layer between AI and the world's software.



Vinkius sits between AI and every application. All communication passes through Vinkius Cloud via the Model Context Protocol (MCP) — with governance, observability, and security at every layer.

Your AI Connections Run Through Vinkius Cloud

The world's largest
managed MCP catalog

Vinkius is the connectivity layer where AI connects 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

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

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

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 — connect your AI agent in under 60 seconds.

Bexio MCP

10 tools available

Cloud-hosted on Vinkius

This MCP connects your business operations—from client relations to accounting—directly to natural language processing. You stop clicking through menus and start talking to your data. Whether you need a list of current customers, want to check the status of an outstanding invoice, or just need to know which projects are running late, your agent handles it.

It pulls together all your core business functions: managing contacts, tracking sales offers, listing product inventory, and overseeing project timelines. If you're looking for a centralized way to interact with complex business data without needing developer access, this is it. You connect through Vinkius, the #1 MCP Catalog, making it available immediately from any compatible AI client.

Core Capabilities

01 — Manage client records

List all contacts or retrieve specific details for a customer, supplier, or partner.

02 — Query financial documents

Check the status and details of existing invoices, offers, and orders to monitor revenue.

03 — Track business projects

Get a list of all active company projects and check their current progress or status.

04 — Access product details

List your entire catalog, including item names, pricing, and stock availability.

05 — View user directories

Retrieve a list of all users within your organization to help coordinate internal tasks.

One Click on Vinkius — From Prompt to Execution

Available at vinkius.com/mcp/bexio — connect your AI agent in three steps.

- 01 First, subscribe to this MCP and enter your Bexio Personal Access Token into Vinkius.
- 02 Next, connect your preferred AI client (like Claude or Cursor) through the Vinkius platform.
- 03 Finally, ask your agent natural language questions—it runs the necessary commands against Bexio and gives you a direct answer.

The bottom line is that you interact with complex business data using only plain conversation.

Built For

This MCP is built for small businesses, bookkeepers, and sales teams who spend too much time jumping between tabs and dashboards. If your job involves tracking client accounts or managing finances, this saves you hours of manual data retrieval.

Accountant / Bookkeeper

You retrieve financial records, like checking the status of invoices or pulling contact details for tax purposes, directly into your workflow.

Sales Representative

You verify offer pricing and create new client contacts without leaving your chat interface. You can quickly list all potential customers to follow up with.

Small Business Owner / Operations Manager

You get an instant overview of the business, whether it's listing all active projects or checking if inventory items are running low.

What Changes When You Connect

- 01 Instantly check invoice statuses. Instead of navigating the billing dashboard to find an overdue payment, simply ask your agent for a list of invoices.

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- 02** Build client records faster. Use the `create_contact` tool to add new leads instantly and record their details without ever leaving your chat window.
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- 03** Keep track of inventory with precision. The `list_items` tool gives you real-time visibility into product stock and pricing, critical for sales teams.
-
- 04** Streamline project oversight. You can ask the agent to list all projects using `list_projects`, giving you an immediate status report across your whole company.
-
- 05** Improve billing efficiency. Use `get_invoice` to pull up specific financial documents, saving minutes of clicking and copy-pasting data.
-
- 06** Coordinate teams better. The system provides a user directory via `list_users`, ensuring everyone knows who is responsible for what tasks.
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Real-World Applications

A client needs their invoice history checked

The bookkeeper asks the agent to list all invoices. The agent retrieves a summary of the last 5 payments, showing which ones are paid and which require follow-up.

Owner needs project status across departments

The owner asks for a list of all projects. The agent reports back which ones are at risk, helping them prioritize resources without manually opening multiple folders.

Sales rep needs to quote a new client

A sales representative uses the agent to check product pricing (`list_items`) and then drafts an offer listing. They can then use `create_contact` to record the client's information immediately.

Accountant verifies client details before tax filing

The accountant requests the specific contact details (`get_contact`) for a partner. The agent finds the necessary name and email instantly, ensuring accurate records.

Patterns to Avoid

Jumping between tabs to find data

X AVOID

The user opens the 'Invoices' tab, then has to manually filter by date, then copies the invoice number into a separate spreadsheet. This takes 5-7 minutes.

✓ INSTEAD

Ask your AI agent directly: 'Show me all invoices from Q1.' The agent runs `list_invoices` and gives you a filtered list instantly.

Creating contacts manually after calls

X AVOID

A salesperson takes notes on a call, then spends 15 minutes navigating the CRM to find the correct form fields and enter all the details.

✓ INSTEAD

Tell your agent: 'Create a new contact for Acme Corp with John Smith.' The agent runs `create_contact` and handles the data entry in one step.

Forgetting which project is active

X AVOID

The manager tries to recall if they have projects running on both marketing and IT. They open the dashboard, scroll through dozens of entries, and waste time trying to remember the true status.

✓ INSTEAD

Ask your agent: 'What are our currently active business projects?' The agent runs `list_projects` and gives a clean list with statuses.

The Right Fit

Use this MCP if you need one single point of access for critical, structured data across accounting (invoices), CRM (contacts), and operations (projects). It's best when your primary bottleneck is switching between systems. Don't use it if you primarily need to view raw files (like PDFs) or manage highly complex custom forms outside Bexio's structure—you still need the source system for that. If your goal is simply messaging or calendar booking, a dedicated communication tool works better; this MCP focuses on structured record management.

Bexio MCP: Automating Contact and Invoice Management

Today, managing client relationships means juggling three separate areas: the main CRM dashboard for contacts, a dedicated accounting portal for invoices, and another view just for projects. To get a full picture of one client's financial standing or project status, you spend ages copy-pasting data between tabs, making mistakes along the way.

With this MCP, your agent handles it all. You simply ask, 'What is the contact info for Acme Corp and what invoices are overdue?' The agent pulls the necessary details from multiple sources—contacts, billing, and orders—and gives you a single, combined answer.

Bexio MCP: Streamlining Product Inventory and Project Oversight

Before this tool, checking on your product inventory meant logging into the stock management section. Checking project progress required navigating to a separate list of ongoing tasks. It was a slow, manual process that slowed down decision-making.

Now, you can ask your agent about both: 'List all projects and tell me if we have enough stock for Item X.' You get instant answers based on the `list_projects` and `list_items` tools combined. Everything is available in a single conversation.

Bexio: 10 Tools for Contact, Invoice, and Project Management

Use these tools to create, read, list, and update every core business record in Bexio using natural language commands.

#	TOOL	DESCRIPTION
01	<code>create_contact</code>	Creates a brand new contact record in your system.
02	<code>get_contact</code>	Retrieves all specific details for one known contact.
03	<code>get_invoice</code>	Gets the full details and status of a single invoice number.
04	<code>list_contacts</code>	Lists all existing contacts, letting you see who needs follow-up.
05	<code>list_invoices</code>	Pulls a list of invoices so you can check payment dates and statuses for many clients at once.
06	<code>list_items</code>	Shows the product catalog, including pricing tiers and current stock levels.
07	<code>list_offers</code>	Lists all pending sales offers so you can see what's ready to turn into an invoice.
08	<code>list_orders</code>	Shows a list of placed orders, helpful for checking fulfillment status and expected delivery dates.
09	<code>list_projects</code>	Retrieves all ongoing projects, along with their defined scope and current progress percentage.
10	<code>list_users</code>	Lists every user account associated with your company profile for team coordination.

See It in Action

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

U What are our top 3 clients that have outstanding invoices?



Client Accounts with Outstanding Invoices

Based on your current records, here are the three accounts needing attention:

1. **Acme Corporation** (ID: con_992): Invoice INV-2024-001 is marked as 'Overdue' since 6/1.
2. **Global Dynamics**: Invoice INV-2024-003 is currently in 'Draft' status and needs approval.
3. **Tech Solutions Inc.** (ID: con_995): Order ODR-77 has an outstanding balance of \$1,200.

U I need to start a new project for Acme. What contacts should I use and what inventory items are needed?



Project Setup Checklist

1. **Primary Contact:** John Smith (info@acme.com) - Found via `list_contacts`.
2. **Inventory Items Needed:**
 - Widget Pro: 50 units (Stock remaining: 300)
 - Basic Widget: 100 units (Stock remaining: 900)

Please confirm if you want me to draft a new project using these resources.

U Can you list all current projects and tell me who the main user is for my team?



Business Overview Report

Active Projects:

- Website Overhaul (ID: proj_2): Status - 75% Complete.
- Q3 Marketing Campaign (ID: proj_4): Status - On Track.

Team Users: Your organization currently has 12 user accounts, including Jane Doe (Admin) and Robert King (Finance). If you need to coordinate tasks for a specific person, just ask me.

Frequently Asked Questions

01 How does the Bexio MCP help me track multiple invoices and accounts?

The Bexio MCP lets you pull up lists of all your invoices, letting you see payment statuses for dozens of clients without manually opening each one. You can filter by status (paid or overdue) in a single conversational query.

02 Can the Bexio MCP create new client records from scratch?

Yes, absolutely. If you talk to your agent and ask it to 'create a contact' for a new lead, it handles all the data entry fields in Bexio automatically, saving you time and clicks.

03 Is the Bexio MCP good for small business inventory management?

It is. You can use the agent to list your products and check stock metadata instantly. This means running out of supplies or knowing product prices is always one simple question away.

04 Does the Bexio MCP help with project status updates?

Yes, it lists all active projects in your system. You can ask for a summary report to see which projects are on track and if any are falling behind schedule.

05 What kind of financial data can I get using the Bexio MCP?







You can retrieve detailed information on invoices, offers, and orders. This lets you check receivables, verify pricing, and see exactly what payments are expected.

Go Live in 60 Seconds

Get your connection token from 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
 Claude AI	Profile → Customize → Connectors → "+" → Add custom connector → Paste endpoint
 Cursor	Settings → Features → MCP Servers → "+ Add New MCP Server" → Type: SSE → Paste endpoint
 VS Code	Ctrl/Cmd+Shift+P → "MCP: Add Server" → add <code>"bexio": { "url": "..." }</code>
 Windsurf	MCP Settings → <code>mcp_settings.json</code> → Add endpoint URL
 ChatGPT	Settings → Tools & plugins → Add MCP server → Paste endpoint
 Gemini	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

Bexio 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 · support@vinkius.com

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DOCUMENT INFORMATION

Generated	June 2026
MCP Server	Bexio MCP
Server ID	019d755b-a6f4-730c-b225-d936346e6507
Platform	Vinkius Cloud for AI Agents
Endpoint	https://edge.vinkius.com/{token}/mcp

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