

MCP SERVER

NO CODE

CLOUD HOSTED

Capsule CRM MCP for AI Agents

Manage sales contacts, opportunities, and tasks from any source

Capsule CRM connects your sales pipeline and contacts directly into any AI agent. You track opportunities, manage tasks, and update client records without ever leaving your workflow tool. This MCP gives you immediate visibility into who you need to talk to next and what stage a deal is actually in.

F Quality Score 3.6/100

contact-management

sales-pipeline

task-automation

lead-tracking

crm-integration

opportunity-management



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.

Capsule CRM MCP

11 tools available

Cloud-hosted on Vinkius

Stop logging into Capsule CRM just to check on a few leads or assign a task. This connector lets your AI agent manage your entire sales pipeline using only natural conversation. Instead of copying data between spreadsheets, you simply ask your client—whether it's Cursor or Claude—to list all open deals or pull up detailed profiles for an organization. Your agent handles the necessary lookups and updates automatically. When you connect this MCP via Vinkius, you get immediate access to thousands of other services, keeping your entire business data accessible from one place. You can create new contacts on the fly, monitor project status across multiple accounts, or set reminders without ever touching a dashboard. It puts real-time CRM intelligence right where you're working.

Core Capabilities

01 — Track and view all client details

The agent lists all your contacts and organizations, providing detailed profiles including emails and tags.

03 — Handle tasks and follow-ups

The agent creates, updates, or checks on any task or reminder needed for a client relationship.

02 — Manage sales deals and opportunities

You can list all open sales opportunities and retrieve key metadata about each deal's value and milestones.

04 — Get account and contact deep dives

You can retrieve detailed information about specific parties (people or organizations), opportunities, or projects using their unique IDs.

One Click on Vinkius — From Prompt to Execution

Available at vinkius.com/mcp/capsule-crm — connect your AI agent in three steps.

- 01 First, subscribe to this MCP through Vinkius and enter your Capsule CRM Personal Access Token.
- 02 Next, point your AI client—like Windsurf or VS Code—to the connected service.
- 03 Finally, just ask your agent what you need. It uses the connection to pull data, create records, and give you an immediate answer.

The bottom line is that once it's configured, your AI client treats Capsule CRM like another set of native commands, eliminating manual lookups entirely.

Built For

This MCP serves anyone who spends time managing customer relationships and sales cycles. It's for Account Managers tired of context switching between their CRM dashboard and their actual work tools, or SDRs who need quick access to contact details before a call even starts.

Account Manager

Monitoring the progress on specific deals, checking project status across multiple clients, and ensuring follow-up tasks are assigned correctly.

Sales Development Representative (SDR)

Getting quick access to a prospect's contact details or organizational tags right from their email client without logging into the CRM first.

Business Administrator

Generating daily summaries of account health, retrieving lists of contacts, and ensuring all project records are current across the board.

What Changes When You Connect

- 01 Instead of logging into your CRM dashboard, you simply ask your agent to list all open deals using the `list_opportunities` tool. You get immediate visibility without switching screens.

-
- 02** Need to follow up with someone? The MCP lets you create a reminder or task instantly using `create_task`, keeping your sales process on track right where you are working.
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- 03** You don't have to manually update client records; the agent can pull comprehensive details for any contact using `get_contact_details` and keep your data current automatically.
-
- 04** Stay organized across different departments. Accessing and listing projects via `list_projects` helps Account Managers maintain visibility into every ongoing job.
-
- 05** When a deal moves forward, you can retrieve precise metadata about it by calling `get_opportunity_details`, giving the agent the exact figures needed for reports.
-

Real-World Applications

Preparing for a client call

You're meeting with an existing client. Instead of manually checking their file, you ask your AI agent to use `get_contact_details` and pull up the last project they worked on, along with all outstanding tasks assigned to them.

Pipeline cleanup

It's end of quarter. You need a list of all deals that are stuck. You ask your agent to run `list_opportunities`, allowing you to filter and report on stalled sales opportunities quickly.

Identifying new leads

You hear about a potential target company. You tell your agent to check if they exist by running `list_contacts`. If they do, you can immediately use `create_person` to log them into the system.

Patterns to Avoid

Copying data between systems

X AVOID

Manually logging into the CRM, copying a contact's email address, then pasting it into a separate ticketing system or spreadsheet.

✓ INSTEAD

Use your AI agent to handle this. Instead of copy/pasting, ask the agent to use ``get_contact_details`` and pull all necessary information directly from Capsule CRM.

Forgetting follow-ups

X AVOID

The meeting ended, but you forget who was supposed to send the next proposal. You have to remember later to go back into the system.

✓ INSTEAD

As soon as the call ends, tell your agent to use ``create_task`` for a reminder. The task is logged and scheduled immediately.

Missing project context

X AVOID

Opening an old client file but forgetting which specific project or deal was active at that time.

✓ INSTEAD

Ask your agent to run ``list_projects`` first, then use ``get_project_details`` to get the full scope and status of that specific work.

The Right Fit

Use this MCP if your daily workflow requires constant data movement between sales contacts, tasks, and deals. If you frequently ask yourself, 'Where is the latest info on X?' or 'Who needs a follow-up?', you need it. Don't use this MCP if you only need to view static reports that don't require interaction, or if your primary goal is just data storage without automation capabilities. For simple data logging, using `create_person` and `create_task` works perfectly; for complex status checking, make sure your agent has access to `get_opportunity_details`. This MCP connects the action (the task) with the data (the contact/deal).

Capsule CRM: Streamlining Contact Management via AI Agents

Today, managing client contacts is a mess of clicks. You open your email, jump to the spreadsheet, then you log into the CRM just to see if John Doe's record has been updated with his new title or company tag. This constant switching slows everything down.

With this MCP, you talk to your agent instead. Need to check a client? Just ask. The agent runs `list_contacts`, finds the right person, and pulls up all their tags and emails instantly. You get the data without leaving your conversation flow.

Capsule CRM: Automating Sales Opportunity Tracking with AI Agents

The biggest drain is tracking deals. Teams waste time jumping between tabs to see if a deal is stalled or what its current projected value is, forcing manual updates in the system.

Now, you talk to your agent about sales. You ask it to `list_opportunities`. The MCP pulls all the details—the milestone status and the monetary values—and presents them immediately. Your pipeline stays visible, always.

Capsule CRM: 11 Tools for Comprehensive Sales Pipeline Tracking

Use these tools to list, create, get details on every contact, opportunity, project, or task within the Capsule CRM system.

#	TOOL	DESCRIPTION
01	<code>create_person</code>	Adds a new person record directly to Capsule CRM.
02	<code>create_task</code>	Creates and logs a new task or reminder for a contact.
03	<code>get_account_info</code>	Retrieves core information about the connected account user.
04	<code>get_opportunity_details</code>	Pulls all specific details, values, and milestones for a single sales opportunity.
05	<code>get_contact_details</code>	Retrieves the full profile information for a specific contact or organization.
06	<code>get_project_details</code>	Gets detailed status and scope information for a particular project record.
07	<code>get_task_details</code>	Retrieves the complete details of a specific task or reminder.
08	<code>list_opportunities</code>	Lists every open sales opportunity currently recorded in your CRM.
09	<code>list_contacts</code>	Retrieves a list of all people and organizations associated with the account.
10	<code>list_projects</code>	Generates a comprehensive list of all existing projects managed by the team.
11	<code>list_tasks</code>	Lists every active and completed task or reminder in the system.

See It in Action

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

U What are my three biggest open deals right now?



Open Opportunity Pipeline

- **Quantum Leap Software:** Value: \$120,000. Milestone: Contract Review (Due next week).
- **Global Logistics Inc.:** Value: \$55,000. Milestone: Discovery Phase Complete.
- **Midtown Retail Group:** Value: \$8,000. Milestone: Needs Stakeholder Approval.

Do you want details on any of these?

U List all people I've interacted with this month.



Here are your recent parties:

- **Jane Smith** (Person) - Tags: Marketing, Follow-up needed.
- **Acme Solutions** (Organization) - Tags: Potential Client, High Value.
- **Mark Jones** (Person) - Last interaction: 2 days ago. Needs task created.

U Can you create a task for Sarah to follow up on the new contract?



Task Created Successfully

A reminder has been set in your account:

- **Task:** Follow up with Sarah regarding Q3 Contract.
- **Due Date:** Tomorrow, 10:00 AM
- **Assigned To:** You

The task is now visible on your dashboard.

Frequently Asked Questions

01 How does the Capsule CRM MCP help me with daily sales tasks?

It lets you manage your entire sales cycle without logging into a separate application. You can ask your agent to list all open deals or check contact details instantly, making sure no follow-up is missed.

02 I need to know if the Capsule CRM MCP supports multiple roles?

Yes. Account Managers, SDRs, and Admins can use it. It gives you tools to track projects, check contact history, and assign tasks—all within your existing workflow tool.

03 Can the Capsule CRM MCP help me find old client information?

Absolutely. You can ask your agent to list all contacts or run a deep dive on specific parties using their IDs. It pulls up everything—emails, tags, and history.

04 Is the Capsule CRM MCP just for viewing data, or can it actually make changes?

It does both. You can retrieve information (viewing) but you can also create new records, like setting a task or adding a new person profile directly through your conversation.

05 What if I don't know the client ID for a deal? Can the Capsule CRM MCP handle that?







You don't need the ID. You can ask your agent to list all opportunities first, and then select the specific deal you want details on from the resulting list.

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>"capsule-crm": { "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

Capsule 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 · support@vinkius.com

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DOCUMENT INFORMATION

Generated	June 2026
MCP Server	Capsule CRM MCP
Server ID	019d7569-2fec-70af-a955-e9981a7be789
Platform	Vinkius Cloud for AI Agents
Endpoint	https://edge.vinkius.com/{token}/mcp

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