

MCP SERVER

NO CODE

CLOUD HOSTED

Clari MCP for AI Agents

Forecasting Revenue & Auditing Pipeline Status

Clari gives your AI agent direct access to your revenue intelligence. Instead of jumping between dashboards, you can ask natural language questions about pipeline health, historical forecasting trends, and account status. It lets you audit changes, list users, and track opportunities without ever leaving your chat window.

F Quality Score 3.6/100

revenue-forecasting

pipeline-management

revenue-operations

sales-analytics

opportunity-tracking

forecast-accuracy



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.

Clari MCP

8 tools available

Cloud-hosted on Vinkius

Managing revenue forecasting usually means opening the dashboard, clicking through tabs, cross-referencing multiple reports, and manually calculating variances. This MCP changes that. Connecting Clari to your AI client gives your agent full control over your sales pipeline data and historical financial records via natural conversation.

You can ask for a list of opportunities above a certain value or check the status of bulk data exports instantly. If you need to understand why a forecast changed, your agent pulls up the manual submissions and audit trail records so you know exactly what happened. This integration makes Clari's complex datasets conversational, allowing sales leaders, revenue ops, and finance teams to get answers immediately without needing specialized dashboard permissions or deep system knowledge. All this power is managed through Vinkius, making it easy for any MCP-compatible client to access your entire revenue data set.

Core Capabilities

01 — Reviewing Opportunity Details

Retrieve specific details and metrics for any defined CRM opportunity.

03 — Tracking System Changes

List platform events and audit trail records, allowing you to securely track who changed what, and when.

05 — Checking User Hierarchy

List all users in the organization, helping you understand team performance structures.

02 — Analyzing Forecast History

Get lists of manual forecast submissions and historical revenue data to spot trends and variances.

04 — Assessing Account Ownership

Access a list of CRM accounts associated with revenue data and monitor their current status.

06 — Monitoring Data Exports

Check the current status of asynchronous bulk data export jobs directly within your workflow.

One Click on Vinkius — From Prompt to Execution

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

- 01 Subscribe to this MCP and enter your Clari API Token, which you get from your Clari settings.
- 02 Connect your preferred AI client (like Claude or Cursor) to the Vinkius catalog using the credentials.
- 03 Start asking questions in natural language. Your agent handles the complex calls to fetch opportunities, review forecasts, or audit logs.

The bottom line is that you talk to your agent, and it pulls live data from Clari without you ever having to manually open a dashboard or run a report.

Built For

This MCP is essential for sales leaders who need instant visibility into forecast accuracy. It's also perfect for Revenue Operations teams constantly auditing changes and finance staff verifying revenue snapshots without opening the main platform.

Sales Leader

Checks current pipeline health, asks what opportunities are worth over a certain amount, or tracks regional forecast trends using natural language prompts.

Revenue Operations Manager

Audits changes to opportunity records and monitors the status of bulk data exports without navigating through multiple administrative screens.

Account Executive

Quickly looks up historical forecast values or detailed metrics for a specific account directly within their chat interface while writing an email.

What Changes When You Connect

- 01 Instant Audit Trail: Reviewing platform events and using the `list_clari_audit_logs` tool lets you track every change to your data, which is critical for compliance.

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- 02** Deep Opportunity Insights: With access to `get_opportunity_revenue_details`, you pull specific opportunity metrics on demand without needing a report generator.
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- 03** Forecast Visibility: Use the `list_clari_forecasts` tool to compare current manual submissions against historical data, making trend spotting immediate.
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- 04** System Oversight: Quickly check bulk data status by calling `list_clari_export_jobs`, eliminating wasted time waiting for asynchronous reports.
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- 05** User Structure Clarity: The ability to run `list_clari_users` helps managers understand team account ownership and performance structures at a glance.
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Real-World Applications

Finding the Source of Pipeline Discrepancies

A sales manager notices that one deal's value seems off. Instead of emailing Revenue Ops, they ask their agent to run `get_opportunity_revenue_details` for that specific opportunity and instantly find the correct historical values needed to reconcile the discrepancy.

Auditing a Critical Data Change

An ops analyst suspects unauthorized changes were made to a key account's record. They use `list_clari_audit_logs` through their agent, retrieving an instant chronological list of events and who accessed the data.

Verifying Quarterly Forecast Changes

A finance team member needs to verify if the current quarter's forecast is accurate. They ask their agent to use `list_clari_forecasts` and immediately compare the latest manual submissions against last month's accepted numbers.

Onboarding New Team Members

A manager needs to quickly understand team structure. They ask their agent to run `list_clari_users` and get a comprehensive breakdown of all user roles, account ownerships, and reporting lines.

Patterns to Avoid

Relying on Dashboard Filtering

✗ AVOID

Trying to filter millions of records in the Clari dashboard just to find who changed a record last week. This takes minutes of clicking and navigating tabs.

✓ INSTEAD

Instead, ask your agent to use ``list_clari_audit_logs``. It pulls the exact event history you need into natural language context immediately.

Manual Export Monitoring

✗ AVOID

Running a huge report and then having to open another dashboard section every five minutes just to check if the bulk data export job is finished. This kills productivity.

✓ INSTEAD

Ask your agent to call ``list_clari_export_jobs``. It gives you one simple status update on whether that large dataset is ready to use.

Searching for Opportunity Metrics

✗ AVOID

Needing the value of a specific deal, but having to navigate through multiple tabs and dropdowns just to pull up the correct historical forecast number.

✓ INSTEAD

Simply ask your agent to use ``get_opportunity_revenue_details``. It retrieves the full context you need in one conversational step.

The Right Fit

Use this MCP if your workflow requires synthesizing complex, structured sales and financial data through natural conversation. If you frequently need to audit records, compare historical forecasts, or pull granular details on specific deals, this is necessary. Don't use it, however, if your goal is simply viewing a high-level summary dashboard—that's where the native Clari UI shines. If you only need simple data extraction (like just listing user names), other general CRM integration tools might suffice, but for deep forecasting intelligence and audit capability, this MCP is required.

Clari MCP: Solving Revenue Forecasting Pain Points

Right now, tracking revenue changes involves a painful process. You have to jump into Clari's dashboard, open the forecasting tab, then switch to the audit log to see who touched it and when. If you need a deep dive on an opportunity, you're clicking through multiple pages just to find one number that might be outdated.

With this MCP, all of that complexity disappears into conversation. You ask your agent about forecast discrepancies or request specific details for an account, and the tool runs the necessary checks—like listing historical forecasts or retrieving detailed opportunity data—and gives you a concise answer right away.

Clari MCP: Improving Sales Pipeline Auditability

Manually verifying who changed an account status, when that change happened, and why is a huge time sink. You have to manually check the system logs, which are often difficult to search and interpret without deep platform knowledge.

This MCP streamlines auditing instantly. By accessing audit trail records through your agent, you get a clear, chronological list of every event, letting you establish trust and accountability across the sales team in seconds.

8 Clari Tools for Revenue Intelligence and Opportunity Tracking

Use these tools within your agent to list user accounts, check forecast submissions, pull opportunity details, or review platform audit logs.

#	TOOL	DESCRIPTION
01	<code>list_clari_users</code>	Lists all users and the organizational hierarchy within your Clari account.
02	<code>get_opportunity_revenue_details</code>	Retrieves detailed information for a specific opportunity using its unique ID or name.
03	<code>list_revenue_accounts</code>	Lists all CRM accounts that have associated revenue data in Clari.
04	<code>list_clari_audit_logs</code>	Provides a list of platform events and audit trail records, showing changes to your data.
05	<code>list_clari_export_jobs</code>	Lists the status of any asynchronous bulk data export jobs that are currently running or completed.
06	<code>list_clari_forecasts</code>	Retrieves manual forecast submissions and historical performance data for trend analysis.
07	<code>list_revenue_opportunities</code>	Lists all CRM opportunities currently tracked within your Clari system.
08	<code>list_clari_time_periods</code>	Retrieves a list of active fiscal years, quarters, and months used for reporting in Clari.

See It in Action

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

U What are all the open deals over \$100k right now?



High-Value Opportunities Found:

- **Global Logistics Q3:** Estimated value of \$250,000. Owner: Jane Doe.
- **Acme Enterprise Expansion:** Value is \$145,000. Status: Negotiation.

These deals are key to hitting the quarterly target. Do you want me to check their associated account ownership details?

U Show me the historical forecast for Q2 and how it compares.



Forecast Comparison Report:

- **Q2 Manual Forecast:** \$8.1M (Total submissions).
- **Current Quarter Target:** \$9.5M.
- **Variance:** You need an additional \$1.4M to meet the target, which is a significant jump from last quarter's run rate. This data was sourced using `list_clari_forecasts`.

U Who owns the accounts in the Top 5 pipeline deals?



Top Pipeline Account Ownership:

ACCOUNT NAME	OWNER	DEAL COUNT
Acme Corp	Sarah Miller	2
Beta Solutions	John Doe	1
Global Logistics	Mike Scott	3

The account ownership data was retrieved directly from the CRM records.

Frequently Asked Questions

01 How can I use the Clari MCP to check my current revenue forecast?

You ask your agent for a report on manual forecasts. It pulls up the latest submissions and gives you an aggregate number, helping you compare that figure against historical performance trends immediately.

02 Does the Clari MCP help me track who changed my deal records?

Yes. You can ask your agent to review the audit logs. It provides a complete history of platform events, telling you exactly which user made a change and when it happened.

03 Can I use Clari MCP in my code or terminal?

Yes. By connecting through your AI client, you can run data retrieval commands from places like the command line or within scripts, letting you programmatically access opportunities and user lists.

04 What if I need to list all users in the organization?

You simply ask your agent to list the users. It retrieves the entire organizational hierarchy from Clari, giving you a clean breakdown of roles and account access quickly.

05 Does this MCP help me monitor large data exports?







Absolutely. Instead of guessing if an export job is finished, your agent checks the status for you using `'list_clari_export_jobs'`, letting you know exactly when that bulk report will be ready.

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>"clari": { "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

Clari 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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