

MCP SERVER

NO CODE

CLOUD HOSTED

Clientify MCP for AI Agents

Manage contacts, deals, and activities across your entire CRM platform

Clientify connects your CRM to your AI agent, letting you manage sales and marketing data through natural conversation. You can list contacts, monitor deal pipelines, audit activities (calls, emails), and access company details instantly—all without opening the Clientify dashboard.

F Quality Score 3.6/100

crm

deal-tracking

contact-management

sales-pipeline

marketing-activities

lead-nurturing



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 — Honeytoken Trap System

Phantom credentials are injected into isolated environments. If a honeytoken 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.

Clientify MCP

8 tools available

Cloud-hosted on Vinkius

This MCP gives your AI client full control over your Clientify CRM account, turning complex dashboards into simple chat commands. Instead of navigating tabs to check on leads or deals, you just ask your agent, and it retrieves the data for you. You can list all contacts and get details on specific people, track every open sales opportunity, or audit recent activities like calls and meetings.

Whether you're a marketing manager needing to quickly review lead segments or an account executive checking company background before a call, this connection keeps your core CRM information right where you are. It lets you monitor everything from the initial contact list through the final deal closure. With Vinkius managing the catalog, you connect once and get instant access to Clientify's full suite of data within any compatible AI agent.

Core Capabilities

01 — Retrieve detailed customer profiles

You can pull specific information about any contact in your CRM by providing their identifier.

03 — Review company relationships

List all associated companies in your Clientify account to maintain a clear view of B2B relationships.

02 — Track and analyze sales opportunities

Get full details on individual sales deals, including current values and status updates.

04 — Audit communication history

List and review past CRM activities, such as recorded calls, sent emails, or scheduled meetings.

One Click on Vinkius — From Prompt to Execution

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

- 01 First, subscribe to the Clientify MCP on Vinkius.
- 02 Next, provide your API Key, which you'll find in Clientify's Settings > My Account > API section.
- 03 Finally, use your AI client to ask questions about contacts or deals. Your agent handles the rest.

The bottom line is that once connected, your AI client uses your credentials to speak directly to Clientify and pull data into our chat window.

Built For

This MCP is for anyone who spends time managing leads, tracking sales progress, or auditing customer interactions. It's perfect for the Account Executive tired of switching between their chat tool and the CRM dashboard just to get basic facts.

Sales Representative

Checks on deal progress and reviews a contact's complete history without leaving their main workspace.

Marketing Manager

Audits which lead segments are active or checks campaign results by listing CRM activities, saving time previously spent in the marketing dashboard.

Account Executive

Quickly looks up company details and recent interactions with a stakeholder straight from their chat interface before making a call.

What Changes When You Connect

- 01 Instantly view contact details. Instead of searching the Clientify interface, asking your agent to use `get_contact_crm_details` gives you a single block of information immediately.

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- 02** Keep track of revenue flow without logging in. You can use `list_sales_deals` and `list_sales_pipelines` to get an instant summary of all open opportunities right in the chat window.
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- 03** Never miss communication context. Use `list_crm_activities` to audit calls, emails, and meetings across your team's history without having to manually navigate through folders.
-
- 04** Maintain a clear B2B view. Running `list_clientify_companies` gives you an immediate list of all associated businesses in the account, helping keep your records clean.
-
- 05** Know who you are working with. You can use `get_my_clientify_profile` to verify the connected user's information directly through your agent.
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Real-World Applications

An Account Executive needs pre-call intelligence

The AE asks their agent, 'What's the background on Acme Corp?' The agent runs `list_clientify_companies` and then `get_contact_crm_details`, returning recent interactions and key contacts instantly for a better pitch.

Sales Ops needs pipeline verification

A Sales Operations team member asks, 'What are our top 5 deals in the initial stage?' The agent uses `list_sales_deals` and filters by stage, giving a clear overview of where revenue is stuck.

Marketing needs to review lead health

A Marketing Manager asks the agent to 'Show me all leads tagged VIP who haven't been contacted this month.' The agent aggregates data from `list_clientify_contacts` and `list_crm_activities`, saving hours of spreadsheet work.

Team lead needs an activity audit

A team lead asks the agent to 'List all calls made by John last week.' The agent executes `list_crm_activities`, providing a chronological log of every interaction for performance review.

Patterns to Avoid

Trying to guess contact status

X AVOID

The user tries to ask, 'Is John Doe ready to buy?' and gets vague answers because the agent can't access raw data.

✓ INSTEAD

Instead, use ``get_contact_crm_details`` or ``list_clientify_contacts``. These tools pull definitive status tags and history directly from Clientify for accurate assessment.

Manually checking deal stages

X AVOID

The sales rep logs into the web dashboard, clicks through multiple tabs, and copies 5 deals' values.

✓ INSTEAD

Just ask your agent to 'List all open opportunities.' The tool uses ``list_sales_deals`` and presents a clean, summarized table of every current opportunity.

Forgetting the company context

X AVOID

The user asks about a contact but forgets if they belong to an associated company or if the company data is stale.

✓ INSTEAD

Use ``list_clientify_companies`` first. This gives you the full B2B relationship view, ensuring you have all necessary corporate context before reviewing any specific contacts.

The Right Fit

You should use this Clientify MCP if your team's workflow relies on accessing data locked inside a CRM dashboard—specifically contact details, deal status, or activity logs. It excels when the goal is synthesizing information from multiple tabs into one conversational answer.

Don't use it if all you need to do is create a brand-new record, like adding a new custom field value that Clientify handles internally. This MCP is read-only for core data; it lets you *read* and *audit*, but it can't perform complex write operations or deep configuration changes. If your primary task is building reports in an external BI tool using raw database pulls, you might be better off with a dedicated ETL connector type instead.

Clientify MCP for AI Agents: Tracking CRM Contact Oversight

Right now, checking on a key client's status means logging into Clientify and manually navigating through tabs. You have to cross-reference the contact record with the activity feed and then jump back out to see company tags. It's slow, it requires multiple clicks.

With this MCP, you simply ask your agent, 'What's the status of Acme Corp?' The tool runs `get_contact_crm_details` and pulls all that information—tags, deal stage, last email date—into one cohesive answer. You get instant context without opening a single new tab.

Clientify MCP for AI Agents: Auditing Sales Deals and Pipelines

Managing sales requires constant monitoring, but compiling the full picture is painful. You'd have to run separate reports on 'Deals,' then manually check which ones are in a specific pipeline stage across multiple dashboards. It's a tedious comparison process.

Now, your agent uses `list_sales_deals` and `list_sales_pipelines`. You can ask it to show all opportunities currently stuck between stages A and B, getting a filtered, actionable list instantly. Your team knows exactly where the bottlenecks are.

Clientify: 8 Tools for CRM Contact and Deal Tracking

Use these tools to retrieve specific contact details, list all open sales opportunities, check company records, or review historical CRM activities.

#	TOOL	DESCRIPTION
01	<code>get_contact_crm_details</code>	Retrieves comprehensive data for one specific contact ID in Clientify.
02	<code>get_deal_details</code>	Fetches detailed information about a single sales deal, including its stage and value.
03	<code>get_my_clientify_profile</code>	Retrieves details about the current user who is connected to Clientify.
04	<code>list_crm_activities</code>	Lists all recorded activities, like calls, emails, and meetings, associated with your account.
05	<code>list_clientify_companies</code>	Retrieves a list of all companies stored within the Clientify system.
06	<code>list_clientify_contacts</code>	Provides a list of every contact in your CRM, including their status and tags.
07	<code>list_sales_deals</code>	Generates a summarized view of all open sales opportunities and deals.
08	<code>list_sales_pipelines</code>	Lists the different sales pipelines you have set up in your Clientify account.

See It in Action

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

U What's the status on AlphaTech? List their contacts, deals, and any recent activity.



AlphaTech CRM Snapshot

- **Current Status:** High Priority Lead (Tag: VIP)
- **Key Contact:** Jane Doe (jane.doe@alphatech.com). Last call was yesterday.
- **Open Deal:** Project Phoenix (\$15,000) is currently in the 'Proposal Submitted' stage.
- **Recent Activity:** John Smith sent a follow-up email on 2026-06-11.

U List all open sales deals over \$10k and tell me their current pipeline status.



Here are the high-value opportunities currently in your funnel:

DEAL NAME	VALUE	STAGE
Mega Corp Upgrade	\$25,000	Negotiation
Beta Launch Package	\$12,500	Needs Review
Gamma System Integration	\$18,000	Initial Contact

Three deals are currently stalled in the 'Initial Contact' stage.

U Show me a list of all companies we track and who is the main contact for each.



Company Directory

- **Acme Solutions:** Primary Contact: Mark Jones (mark.j@acmesol.com). Tags: Enterprise.
- **Global Dynamics:** Primary Contact: Sarah Lee (sarahl@globaldyn.net). Tags: Mid-Market.
- **Riverbend Group:** Primary Contact: David Kim (davidk@riverbengroup.org). Tags: New Lead.

Frequently Asked Questions

01 How do I use the Clientify MCP for AI Agents to see contacts?

You can list all contacts or pull specific details on any individual person by asking your agent. This gives you immediate access to tags, status, and contact history without leaving your chat window.

02 Can I use the Clientify MCP for AI Agents to track my sales pipeline?

Yes. You can list all active pipelines and check deal statuses instantly. This lets you monitor revenue flow across different stages of opportunity development conversationally.

03 Is the Clientify MCP for AI Agents good for marketing audits?

It's excellent for auditing. You can use it to list CRM activities, allowing you to see all calls and emails logged against a client over time for campaign review.

04 Does the Clientify MCP for AI Agents require I know API keys?

No. Once the connection is established by providing your key, you interact with it only through natural language prompts to your agent. You never see or use the raw keys again.

05 Can this MCP tell me about a company I've never worked with?







Yes, if the company exists in Clientify, you can list all client companies and get an overview of their stored details. This helps maintain your B2B relationship map.

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>"clientify": { "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

Clientify 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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