

MCP SERVER

NO CODE

CLOUD HOSTED

Copilot CRM (Assembly) MCP for AI Agents

Manage Client Profiles and Invoice Status in a Service Business Portal

Copilot CRM (Assembly) MCP equips your AI agent to manage client relationships, company records, billing cycles, and project files inside the Copilot portal. It lets you list contacts, check invoice statuses, update profiles, and search historical documents using only natural language.

A+ Quality Score 100/100

client-portal

invoicing

service-business

client-onboarding

file-sharing

crm



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.

Copilot CRM (Assembly) MCP

10 tools available

Cloud-hosted on Vinkius

This connector integrates the Copilot client portal directly into your AI workflow. Forget switching between tabs or manually updating spreadsheets; your agent handles the back-office work for service businesses.

You can ask it to list all your active clients or find a specific company's details, even pulling associated contacts and account linkages. Need billing info? You can check invoice statuses, pull payment totals, and confirm due dates just by asking. If you need historical context, the agent searches through files and portal messages for any piece of data.

This entire system runs using natural conversation, letting you manage everything from client onboarding to project tracking without ever leaving your chat window. Because Vinkius hosts this MCP, all compatible AI clients—Claude, Cursor, Windsurf, and others—get instant access to these powerful functions.

Core Capabilities

01 — Manage Client Records

Creates new client profiles, retrieves detailed contact information, or updates existing account statuses.

03 — Handle Billing Inquiries

Checks the status of invoices, pulls total amounts, and confirms due dates for any client account.

05 — Discover System Data

Lists available custom fields, forms, and account settings used across the entire CRM platform.

02 — Track Company Entities

Lists and resolves corporate entity data, including legal names and primary contacts associated with clients.

04 — Search Documents and Messages

Retrieves metadata on uploaded files or searches message threads within the client portal workspace.

One Click on Vinkius — From Prompt to Execution

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

- 01 Connect your AI client to the Copilot CRM MCP and authorize access using your API key.
- 02 Tell your agent what you need. Instead of clicking through menus, simply ask questions like, 'What are all my overdue invoices?'
- 03 The agent executes the necessary actions, retrieving structured data (like invoice numbers or contact names) and presenting it back to you in plain language.

The bottom line is that your AI client acts as a unified interface for managing complex business records across multiple CRM functions using only conversation.

Built For

This MCP is built for professionals who spend time juggling multiple tabs, jumping between billing systems and contact lists. It's perfect for agencies that need to manage client lifecycle end-to-end or law firms needing quick access to historical documents during planning sessions.

Agency Account Manager

On a Tuesday afternoon, they use the MCP to list all clients who haven't had recent activity and then check each one's last invoice status to build an account health report.

Bookkeeper / Accountant

They ask the agent to retrieve all invoices for a specific client that are currently past due, getting totals and dates instantly without opening the billing module.

Support Specialist

When a client calls with an issue, they use the MCP to immediately pull up custom fields and recent messages related to that client ID to provide fast, accurate support.

What Changes When You Connect

-
- 01 Checking billing status is instant. Instead of navigating to the invoicing section, you simply ask your agent about overdue invoices or payment totals.

 - 02 Client records are always fresh. Need to add a new contact? The agent handles creating a client profile and linking it to existing companies instantly.

 - 03 Never lose data again. Your agent searches through all files and messages in one go, finding that 'Q1-Report.pdf' or the specific message thread you need immediately.

 - 04 Streamlined operations mean less clicking. You can update client contact details or account statuses using a simple command instead of logging into multiple backend dashboards.

 - 05 Better planning for firms. Quickly pulling up all relevant documents, messages, and invoice histories allows accountants to prepare reports faster during review sessions.
-

Real-World Applications

A client needs an account audit.

The Account Manager asks the agent to pull all data for 'Global Logistics'. The agent retrieves their current contact details, lists associated companies, pulls up recent messages, and checks the status of their three last invoices.

Investigating payment delays.

When a user is unsure about payments, they ask the agent to list all invoices for a company. The agent returns a table showing due dates and current 'Paid' or 'Overdue' status at a glance.

Starting a new client relationship.

The consultant asks the agent to create a brand new client record for 'Acme Corp' with specific initial details. The agent handles the creation and links it to existing company records, getting the account ready.

Finding project documentation.

A support team member needs an old contract. They ask the agent to search files for 'Acme Corp' related to Q1 reports. The agent lists available documents and provides download links.

Patterns to Avoid

Manual Data Transfer

X AVOID

Having to copy client names from a spreadsheet, then manually paste them into the CRM portal's 'create client' form. This is slow and error-prone.

✓ INSTEAD

Tell your agent to create the new records directly. Just say, 'Create a new client for John Smith with email john@example.com.' The agent handles the data entry automatically.

Incomplete Record Keeping

X AVOID

A support team member only checking the message history but missing critical updates on the billing status, leading to confusion.

✓ INSTEAD

Combine requests: 'Show me all messages for Acme Corp and also list their outstanding invoices.' This gives you both communication context and financial data.

Ignoring Company Links

X AVOID

Only looking at a single client's profile without checking if they are linked to a larger parent company, missing broader risk factors.

✓ INSTEAD

Always ask the agent to resolve corporate entity properties. Ask for 'all companies associated with this client ID.' This gives you the full organizational picture.

The Right Fit

Use this MCP if your workflow requires constant movement between client contact data, invoicing status, and file archives within a service business context. If your primary need is simply generating marketing copy or summarizing unrelated texts, this isn't it. You don't need to pull records from multiple systems; you need one single point of access for structured operational data. Don't use this if you just need generic document summaries; instead, use a pure RAG tool that indexes knowledge bases. If you only need to write emails but never touch the client record itself, an email drafting MCP is better.

Copilot CRM (Assembly) MCP: Automating Client Onboarding Workflows

Right now, setting up a new account means navigating to one screen to create the contact, then opening another tab to link them to a company ID, and finally going into a third area just to upload initial documents. You spend minutes copy-pasting names and verifying IDs across three different modules.

With this MCP, your agent handles all of that in one conversation. Simply telling it, 'Set up Acme Corp as a new client,' triggers multiple actions: creating the record, linking the company, and documenting the initial setup—all without you leaving your chat.

Copilot CRM (Assembly) MCP: Managing Invoice Status for Service Businesses

Checking billing requires jumping into the invoicing module, filtering by date range, then manually checking every line item to see if it's paid or overdue. You end up with a spreadsheet and several tabs open just to answer 'How much is owed?'

Now, you ask your agent about payments. It instantly gathers all pending invoices for the period and presents a clear summary of totals, due dates, and outstanding balances right there in the chat.

Copilot CRM (Assembly): 10 Tools for Client & Invoice Operations

Use these tools to create, list, update, and retrieve specific client, company, invoice, file, and message records directly from the portal.

#	TOOL	DESCRIPTION
01	<code>create_client</code>	Adds a brand new client profile into the portal using basic identifying details like name and email.
02	<code>get_client_details</code>	Pulls comprehensive information about one specific client, including contact info and associated company data.
03	<code>list_clients</code>	Generates a list of all clients in your CRM, showing their IDs, names, emails, and current account status.
04	<code>list_companies</code>	Retrieves a catalog of corporate entities, including company IDs, legal names, and main contacts.
05	<code>list_custom_fields</code>	Shows you the definitions for all custom fields used across different parts of the CRM system.
06	<code>list_files</code>	Lists files uploaded to the portal, providing filenames, storage paths, and when they were last accessed.
07	<code>list_forms</code>	Retrieves definitions for various intake or feedback forms available in the client workspace.
08	<code>list_invoices</code>	Generates a list of all invoices, showing amounts, due dates, payment status, and who they are billed to.
09	<code>list_portal_messages</code>	Lists message threads from the client portal, detailing sender, receiver, content summary, and timestamps.
10	<code>update_client</code>	Modifies specific attributes of an existing client, like changing their name or updating account status.

See It in Action

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

U What are the three biggest companies I deal with that have open invoices?



Client Financial Summary

COMPANY NAME	TOTAL DUE	OVERDUE DAYS
Global Logistics	\$12,500.00	18 days
Beta Systems	\$4,500.00	5 days
Acme Corp	\$900.00	N/A

Action: Do you want me to draft a reminder email for Global Logistics? (Yes/No)

U I need the details and any files related to my client, 'Jane Doe'.



Client: Jane Doe

Contact Info: jane.doe@example.com | Account Status: Active

Linked Company: [Global Solutions Inc.]

Recent Files: 📁 Q2-Proposal-Draft.pdf (Uploaded 2024-05-10)

Messages: Last message was about the contract review on May 12th.

U What kind of data fields do I have available in the system?



Available Custom Fields:

We currently use custom fields for:

- Primary Industry (Dropdown)
- Contract End Date (Date Picker)
- Project Lead Name (Text Input)

These definitions let us capture specific business data beyond just name and email.

Frequently Asked Questions

01 How does the Copilot CRM (Assembly) MCP help me check client billing details?

It allows you to ask for invoice statuses or payment totals using natural conversation. Instead of navigating complex billing screens, your agent pulls up a summary showing exactly which invoices are due and when they were paid.

02 Can I use the Copilot CRM (Assembly) MCP to find old client documents?

Yes, you can ask it to search through files uploaded in the portal. It retrieves metadata on specific documents, like filenames and upload dates, so you know exactly what history exists for a client.

03 What if I need to update an existing client's information?

You simply tell your agent what change is needed. You can ask it to update the account status or correct a contact detail, and it makes the modification directly within the CRM system.

04 Does Copilot CRM (Assembly) MCP help with setting up new client accounts?

Absolutely. The agent handles creating brand new client records for you. You just provide the basic identity info, and it builds out the profile in the portal.

05 Is Copilot CRM (Assembly) MCP good for law firms managing case data?

Yes, because it manages company associations and client profiles. It lets you track multiple related entities—the client, the associated corporations, and all their project files—in one conversation.

06 Does this MCP handle tracking communication history?







Yes, it lists messages sent through the portal. You can pull up message threads to see who was communicating with whom and when, giving you a clear record of interaction.

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](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>"copilot-crm-assembly": { "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

Copilot CRM (Assembly) 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

INDEPENDENT PLATFORM DISCLAIMER

Vinkius is an independent platform and is not affiliated with, endorsed by, sponsored by, verified by, or otherwise authorized by Copilot CRM (Assembly). All third-party trademarks, logos, and brand names are the property of their respective owners. Their use in this document is strictly for informational purposes to identify service compatibility and interoperability.

DOCUMENT INFORMATION

Generated	June 2026
MCP Server	Copilot CRM (Assembly) MCP
Server ID	019d757b-fda1-7255-991f-cfa2d19aa5fd
Platform	Vinkius Cloud for AI Agents
Endpoint	https://edge.vinkius.com/{token}/mcp

LICENSE & USAGE

This document is generated automatically by the Vinkius PDF Engine. Content reflects the MCP server configuration at the time of generation and may change as updates are deployed. For the most current information, visit vinkius.com/mcp/copilot-crm-assembly.