

MCP SERVER

NO CODE

CLOUD HOSTED

# Daftra MCP for AI Agents

## Manage Client Billing and ERP Data

Daftra equips your AI agent to handle core ERP functions—from client relations and inventory management to complex accounting tasks. Connect it via MCP to automatically track invoices, manage estimates, audit business expenses, and keep detailed records for every client.

**A+** Quality Score 100/100

invoicing

expense-tracking

client-management

business-automation

accounting-software

estimates



# 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

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## 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

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## 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

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## 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](https://cloud.vinkius.com) — connect your AI agent in under 60 seconds.

# Daftra MCP

10 tools available

Cloud-hosted on Vinkius

This Daftra MCP lets your AI agent run the numbers in your cloud ERP system using nothing but natural conversation. Instead of jumping through menus on a web dashboard, you just ask the question—whether it's 'What are all my outstanding invoices?' or 'Can you find John Smith's full history?' The agent executes the task immediately and gives you the answer. You can manage client profiles, monitor sales estimates, track spending with recorded business expenses, and even check your current product inventory, all without touching a single tab. When you connect this MCP through Vinkius, your AI client gets direct access to these tools, allowing you to orchestrate complex business operations conversationally.

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## Core Capabilities

### 01 — Search, list, and get details on clients

Find specific customer records or list all existing accounts in your system.

### 02 — Monitor sales invoices and estimates

Retrieve full details on sales invoices, check payment status, and view current pricing quotes.

### 03 — Audit business expenditures and inventory

List all recorded expenses or track available products/services in your system's stockroom.

# One Click on Vinkius — From Prompt to Execution

Available at [vinkius.com/mcp/daftra](https://vinkius.com/mcp/daftra) — connect your AI agent in three steps.

- 01** Connect the Daftra integration to your AI agent and authorize it using your API credentials.
- 02** The agent accesses the MCP, allowing you to issue commands in plain language (e.g., 'List all expenses last month').
- 03** The system retrieves and formats the raw data into an easy-to-read conversational summary.

The bottom line is your AI client handles the backend database calls so you don't have to click through dashboards or write SQL queries.

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## Built For

This MCP targets small business owners and operational teams who are tired of juggling multiple screens, manually cross-referencing invoices with client spreadsheets. If your job involves keeping track of money—invoices, expenses, or client accounts—you need this.

### Accountant

Auditing business expenditures and running reports on billing cycles simply by asking the AI agent.

### Sales Manager

Quickly researching a client's complete history, checking previous estimates, or finding contact details during a sales call.

### Business Owner

Getting an immediate status update on cash flow—like listing all unpaid invoices—without logging into the full accounting platform.

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## What Changes When You Connect

- 01** Instantly get a complete client history. Instead of opening the CRM, then the billing portal, you just ask your agent to run 'get\_client\_details' and see everything in one chat response.

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- 02 Stay on top of cash flow by listing all unpaid invoices with 'list\_invoices'. You immediately know who owes money and how much they owe without navigating complex financial dashboards.

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  - 03 Audit costs easily. Running 'list\_expenses' pulls together all recorded business spending, helping you categorize and summarize spending trends across the whole company.

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  - 04 Build client records quickly. If you sign a new customer on the fly, use 'create\_client' to add them directly into your system without switching apps.

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  - 05 Track sales opportunities better by listing estimates with 'list\_estimates'. You can see what was quoted and if it has turned into an invoice.
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## Real-World Applications

### **Need a quick status check on overdue accounts?**

You need to know which clients haven't paid. Ask your agent to list all invoices and filter for unpaid ones. The agent returns the count, total amount due, and names of the top debtors instantly.

### **I need to reconcile last month's spending.**

It's time for bookkeeping. Ask your agent to list all expenses from the past 30 days using 'list\_expenses' and group them by category so you can submit an expense report.

### **On a sales call, what is this client's whole record?**

A prospect asks about your service history with them. Ask your agent to use 'search\_clients\_by\_name' first, then ask for their full details using 'get\_client\_details'. You get all contacts and balances immediately.

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# Patterns to Avoid

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## Manually cross-referencing data

### ✗ AVOID

Opening Daftra, going to the Billing tab, downloading a CSV of invoices. Then opening Excel and manually matching that list against your CRM in Google Sheets.

### ✓ INSTEAD

Just tell your agent to 'list\_invoices'. It handles all the filtering and exporting steps for you.

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## Using generalized AI prompts

### ✗ AVOID

Asking an LLM, 'Tell me about my money problems.' The response is vague fluff that requires more questions or manual data fetching.

### ✓ INSTEAD

Be specific: 'List all unpaid invoices from the last quarter using list\_invoices.' Direct commands get direct answers.

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## Ignoring client records

### ✗ AVOID

Meeting a new vendor and having to write down their details because you can't access the profile history.

### ✓ INSTEAD

Use 'get\_client\_details' or 'create\_client'. The agent pulls up all necessary data instantly, saving time and detail.

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## The Right Fit

You should use this MCP if your business processes rely on connecting disparate pieces of financial information—like linking a client's contact info (from list\_clients) directly to their outstanding bill (from list\_invoices). It's ideal for automating accounting workflows. Don't use it, however, if you only need simple text generation or basic document writing; those tasks don't require connecting to your live ERP data. If you just want to write a marketing email based on general knowledge, stick with plain AI. But if the content needs specific financial metrics—like confirming an estimate via list\_estimates—this is mandatory.

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## Daftra MCP: Streamlining Client Billing and Invoicing Management

Today, managing client accounts means opening Daftra, navigating to the 'Invoices' tab, then maybe switching over to find a specific estimate that was quoted months ago. You spend ten minutes just compiling a simple status report because no single view shows everything: who owes money, and what did we quote them last?

With this MCP, you simply ask your agent for an overview of the client's financial standing. The response instantly compiles invoice statuses, outstanding balances, and even links to their most recent estimates. You get a complete picture without ever clicking a tab.

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## Daftra MCP: Automating Expense Tracking and Accounting Workflows

Manual accounting involves logging into the expense section, filtering by date range, then manually grouping items to categorize them for tax purposes. This process is slow and prone to missing details.

The agent handles this complexity for you. By running 'list\_expenses', it gathers all recorded spending data points and provides a categorized summary ready for your accountant to review. It's instant bookkeeping.

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# Daftra: 10 Tools for ERP Operations Management

Use these tools to automate tasks like listing clients, finding invoice details, tracking expenses, or creating new records directly through your AI agent.

#	TOOL	DESCRIPTION
01	<code>create_client</code>	Adds a new client record and contact details to your ERP database.
02	<code>get_client_details</code>	Pulls the full profile, history, and current outstanding balances for one specific client.
03	<code>get_invoice_details</code>	Retrieves all line items, tax details, and payment records for a single sales invoice.
04	<code>get_site_metadata</code>	Gathers general settings and organizational parameters from the Daftra system configuration.
05	<code>list_clients</code>	Lists all client accounts, including names, IDs, and contact emails in your system.
06	<code>list_estimates</code>	Retrieves a list of all price quotes and sales estimates currently saved.
07	<code>list_expenses</code>	Generates an inventory of all recorded business expenses, including categories and amounts.
08	<code>list_invoices</code>	Provides a list of sales invoices, showing numbers, totals, and payment statuses.
09	<code>list_inventory_products</code>	Lists all physical products and services tracked in your inventory system along with their pricing.
10	<code>search_clients_by_name</code>	Locates a client's profile using just a keyword from their name or company.

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## See It in Action

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

**U** Show me the billing status for Global Logistics, including any recent expenses.



### Client: Global Logistics

- **Account Status:** Active
  - **Outstanding Balance:** \$1,200 (Due Date: Oct 30)
  - **Recent Activity:**
    - \* Invoice #4567: Paid in full.
    - \* Expense Log:
      - \* Office Supplies: \$50 (Last week)
      - \* Travel Reimbursement: \$200 (Last month)
- This client is current, but they have two outstanding estimates over \$500.

**U** What products or services do I need to list in inventory?



### Inventory Report

Here are the top 5 items currently tracked:

1. Service A: \$99/hr (Qty: Unlimited)
2. Product X: \$45 each (Stock remaining: 30)
3. Consulting Package B: \$2,500 flat.

Need me to check pricing or list a new service?

- U** List all clients that have never paid an invoice.



### Unpaid Client List

I found 3 client accounts with no payment history:

- Alpha Corp (Contact: John Smith)
- Beta Solutions (Contact: Jane Doe)
- Gamma Group (Contact: info@gamma.com)

You can get more details on any of these using their full profile data.

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## Frequently Asked Questions

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**01 How does the Daftra MCP help me track invoices without logging into the main accounting software?**

The Daftra MCP lets your AI agent list all sales invoices and check their payment status instantly. You get a summary of totals, outstanding amounts, and who owes money directly in the chat window.

**02 Can I use the Daftra MCP to find out what services or products we sell?**

Yes. The MCP can list all items currently tracked in your inventory. You'll get product IDs, names, and current pricing data without needing to browse the inventory page.

**03 Is Daftra MCP good for tracking business expenses?**

It's great for that. The agent can pull together a list of all recorded business expenses, allowing you to easily summarize spending by category or date range for tax preparation.

**04 What if I need to add a brand new client record?**

You can use the MCP to create a new client. Just tell your agent who the client is, and it will populate the necessary records into your ERP database for you.

**05 Can this MCP look up detailed information about a specific customer?**







Absolutely. By asking for details on any client, the agent retrieves their full profile history, contact information, and outstanding balances in one go.

# Go Live in 60 Seconds

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

# Daftra 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](https://vinkius.com) · [support@vinkius.com](mailto:support@vinkius.com)

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