

MCP SERVER

NO CODE

CLOUD HOSTED

# DealHub CPQ MCP for AI Agents

## Automate Quote Generation and Opportunity Tracking in Your CRM

DealHub CPQ connects your AI agent directly into your Configure, Price, Quote (CPQ) and sales pipeline. It lets you create complex quotes from existing CRM records, track the exact status of opportunities, manage deal stages, and synchronize data across systems like Salesforce or HubSpot—all through natural conversation.

**A+** Quality Score 100/100

cpq

quote-management

sales-orchestration

contract-lifecycle

revenue-operations

deal-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

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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.

# DealHub CPQ MCP

10 tools available

Cloud-hosted on Vinkius

You can take full control of your entire sales cycle using this MCP. Instead of logging into separate portals to check on deals or build estimates, you talk to your agent about it. You prompt the system to create a new quote, and it generates a fully structured CPQ sequence linked directly to your CRM data. Need to know if a client viewed the PDF? It retrieves those detailed cloud logs instantly. The platform lets agents perform structural extractions of quotes and even force real-time data syncs against providers like SFDC or MS Dynamics. This means everything stays consistent, giving you full visibility into every opportunity stage and user assignment without ever leaving your chat interface. Connecting this MCP through the Vinkius catalog gives any compatible AI agent access to these crucial sales tools.

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## Core Capabilities

### 01 — Generate new quotes

Creates a fresh CPQ sequence and links it instantly to an existing CRM opportunity record.

### 02 — Track deal progress

Lists ongoing deals, retrieves specific synced custom fields, or updates the official stage of an opportunity in bulk.

### 03 — Check quote status history

Retrieves detailed cloud logs to confirm if customers viewed, signed, or rejected a generated PDF document.

### 04 — Sync CRM data

Forces real-time data ingestion loops between DealHub and external CRMs like Salesforce or MS Dynamics.

### 05 — Manage user lists

Identifies and retrieves accurate lists of users within the system for review or assignment.

# One Click on Vinkius — From Prompt to Execution

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

- 01** Subscribe to the DealHub CPQ MCP and provide your API Token, which you'll find in DealHub's Admin Mode settings.
- 02** Connect this MCP through any compatible AI client (like Claude or Cursor) to your workflow environment.
- 03** Tell your agent what you need—for example, 'Create a quote for opportunity XYZ.' Your agent then executes the necessary actions and returns the structured data.

The bottom line is that after connecting your credentials, your AI client handles all the API calls; you just use natural language to manage complex sales operations.

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## Built For

This MCP is for Sales Operations professionals who spend too much time manually updating CRM records and tracking quote status. It's also perfect for Sales Reps who need to generate accurate, complex quotes during a live negotiation without switching applications.

### Sales Representative

Needs to create a new, complex quote on the fly or update an opportunity stage right from their chat window during a customer call.

### Sales Operations Manager

Monitors active sales pipelines and audits detailed quote histories, ensuring all CRM data is consistent across platforms without manual intervention.

### Finance/Contract Manager

Verifies contract signatures or reviews the full details of a finalized deal by checking explicit cloud logs directly through natural language prompts.

## What Changes When You Connect

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- 01** Create quotes instantly: Don't manually navigate quote builders. Simply ask your agent to use `create_quote` to generate a new CPQ sequence linked directly to any opportunity.

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  - 02** Know the deal status: Stop guessing if a client opened the PDF. Use `get_quote_status` to retrieve explicit cloud logs detailing views, signatures, and rejections in real time.

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  - 03** Keep data current: Dealing with multiple CRMs is a headache. The `sync_crm` tool forces immediate synchronization of custom fields across all your platforms.

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  - 04** Manage the pipeline effortlessly: Need to change an opportunity stage? Use `update_opportunity` to instantly move deals and ensure Sales Ops visibility without logging into the core CRM.

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  - 05** Full user oversight: Quickly get a comprehensive list of active users using `list_users` , perfect for onboarding new reps or auditing permissions.
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## Real-World Applications

**A sales rep needs to adjust pricing and generate an updated quote**

The agent runs the ``open_quote`` tool on a draft, extracts current account parameters, and then uses that data to run ``create_quote``, providing the rep with a new, accurate document immediately.

**Finance needs confirmation that a signed contract was linked correctly**

The agent uses ``get_quote_status`` on the quote ID. If it confirms a signature, the finance team can then use ``sync_crm`` to push the final signed status back into the official CRM record.

**A sales operations manager needs to update multiple opportunity stages after a board meeting**

The agent runs ``list_opportunities`` to identify all deals in 'Negotiation'. Then, using ``update_opportunity``, the manager can move them all to 'Proposal Sent' and ensure visibility across the team.

**A new rep needs access and visibility across all ongoing deals**

The agent runs ``list_users`` for permission checks, followed by ``list_opportunities`` to get a snapshot of the entire active pipeline, giving the rep immediate context.

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## Patterns to Avoid

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### Manually copying status updates

**X AVOID**

A user checking an email saying 'Quote signed' and then manually logging into Salesforce to update the opportunity stage. This is slow, error-prone, and creates data lag.

**✓ INSTEAD**

Use the DealHub CPQ MCP to allow your agent to read specific cloud logs with ``get_quote_status`` and simultaneously trigger an automatic update using ``update_opportunity``, ensuring real-time accuracy.

### Overlooking data inconsistency between systems

**X AVOID**

A rep updates a custom field in the CRM, but forget to manually push that change into the CPQ system. The final quote is based on outdated information.

**✓ INSTEAD**

Always use ``sync_crm`` after making manual changes in any source system. This forces the agent to reconcile all fields and maintain absolute data consistency across DealHub and your primary CRM.

### Forgetting which records are active

**X AVOID**

A manager needs a list of deals but only finds drafts, missing the live ones that are actually being worked on. They waste time chasing ghosts.

**✓ INSTEAD**

Use ``list_opportunities`` to enumerate all currently attached structured rules and get an accurate count of active, working pipeline items immediately.

## The Right Fit

Use this MCP if your sales process relies heavily on precise quote generation, multiple CRM touchpoints (Salesforce, HubSpot), or detailed audit trails for signed contracts. You need to know the exact status—not just 'in progress'—and have real-time data consistency is critical.

Don't use it if you primarily manage basic lead lists that don't require complex pricing logic or deep historical tracking (like viewing logs). If your needs are limited to simple contact management, a simpler directory tool will suffice. However, if the deal involves quoting, opportunity stage changes, or cross-platform synchronization, this is necessary.

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## DealHub CPQ and Sales Quote Generation with AI Agents

Today, building a quote often means juggling three screens: the CRM record, the pricing sheet, and the document generation tool. You copy opportunity data into the pricing engine, manually adjust variables, then export it to a PDF that you have to re-upload somewhere else just to track if the client saw it.

With this MCP, your agent takes over the entire sequence. Instead of copying or pasting, you simply ask for a quote using `create_quote`. The system handles all the complex data binding and generates the final CPQ sequence that's ready to go.

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## DealHub CPQ Opportunity Tracking via AI Agents

Tracking a deal's history is usually a manual audit process. You check email for signatures, log into the CRM to see stage changes, and then cross-reference a separate document to confirm pricing details—it's slow and fragmented.

Now you ask your agent to track the status of an opportunity using `get_opportunity`. It pulls all that history together—signatures, stages, custom fields—and gives you one definitive answer. The entire process is immediate.

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# Manage 10 DealsHub CPQ Tools for Sales Orchestration

These tools allow your agent to perform specific actions: creating quotes, listing deals, checking statuses, and synchronizing customer data across systems.

#	TOOL	DESCRIPTION
01	<code>create_opportunity</code>	Creates a highly available new opportunity record and links it to specific customer bindings.
02	<code>create_quote</code>	Generates a fresh CPQ quote sequence, linking the data directly to a native CRM block inside DealHub.
03	<code>get_opportunity</code>	Runs an automated validation check and returns explicit gateway history for a given opportunity ID.
04	<code>get_quote_status</code>	Retrieves detailed cloud logging to show if a customer viewed, signed, or rejected the quote PDF.
05	<code>list_opportunities</code>	Lists all active opportunities and exports structured rules containing current billing details.
06	<code>list_quotes</code>	Identifies and retrieves a list of currently active quotes linked to the gateway authentication system.
07	<code>list_users</code>	Retrieves an accurate list of users within the DealHub platform for review or assignment purposes.
08	<code>open_quote</code>	Performs structural data extraction on a quote, retrieving properties needed to drive account logic.
09	<code>sync_crm</code>	Forcibly updates and synchronizes rich customer churn flags and validations with external CRM systems.
10	<code>update_opportunity</code>	Updates an existing opportunity record by inspecting deep internal arrays that contain plan details or mathematical data.

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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 What's the latest on quote 'DHQ-901'? Has it been signed and what stage should I move the opportunity to?



## Quote Status Report: DHQ-901

**Signature Status:** Signed by Acme Corp (Date: 2026-06-10). Action:\* PDF viewed on site.

- **Opportunity Details:** Current stage is 'Proposal Sent'.
- **Recommended Action:** Since the quote was signed, I've automatically updated the opportunity status to **Closed Won**. CRM sync confirmed.

- U I need a new quote for Acme Corp. Use their existing deal data and link it to the 'Enterprise Tier' plan.



## Quote Sequence Created!

The CPQ block has been generated successfully and linked to the Opportunity ID: `opp_abc123`.

- **Pricing:** \$45,000 (Includes 3 seats).
- **Line Items:** Base License + Consulting Hours.
- **Next Step:** Use this unique URL to define specific line items and finalize the pricing details.

- U Check out the opportunities assigned to Sarah. Which ones need immediate attention?



## Active Opportunity Summary (Assigned: Sarah)

The following deals require review based on their current state:

- **Deal ID 123:** Stage 'Negotiation'. Needs pricing validation. (Use `get_opportunity` )
- **Deal ID 456:** Stage 'Drafting'. Requires user assignment update. (Check users via `list_users` )
- **Deal ID 789:** Status Unknown. Last sync attempt failed. Run `sync_crm` immediately.

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# Frequently Asked Questions

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**01 How does the DealHub CPQ MCP help me manage my sales pipeline without logging into multiple apps?**

You can run your entire sales process—from creating a quote to syncing data and checking signatures—within one conversation with your agent. This saves time by keeping all related actions in a single chat window.

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**02 Can DealHub CPQ track if the client actually viewed or signed the quote PDF?**

Yes, it retrieves explicit cloud logs showing exactly when the document was opened, who saw it, and whether it received a signature. This gives you critical audit trail visibility.

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**03 Does DealHub CPQ sync data with Salesforce or other CRMs automatically?**

It forces real-time data ingestion loops against major providers like SFDC and MS Dynamics, guaranteeing that your custom fields and opportunity stages are always up to date.

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**04 I'm a sales rep. How do I use DealHub CPQ to speed up my quoting process?**

Instead of building quotes manually, you just ask the agent to generate one using `create\_quote`. It pulls data from your CRM and builds the complex sequence instantly, saving you minutes on every single deal.

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**05 What if I change a deal stage in my CRM; will DealHub CPQ know about it?**

You can tell the agent to run a sync. This action forces all data boundaries and field values from your primary CRM into the DealHub system, ensuring consistency everywhere.







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# 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>"dealhub-cpq": { "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

# DealHub CPQ 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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### DOCUMENT INFORMATION

Generated	June 2026
MCP Server	DealHub CPQ MCP
Server ID	019d7582-cc0e-7083-b805-751ddab0e50f
Platform	Vinkius Cloud for AI Agents
Endpoint	<a href="https://edge.vinkius.com/{token}/mcp">https://edge.vinkius.com/{token}/mcp</a>

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