

MCP SERVER

NO CODE

CLOUD HOSTED

Dubsado MCP for AI Agents

Automate Client Onboarding and Billing Workflows

Dubsado MCP connects your AI client to your entire creative business workflow, letting you manage projects, invoices, contracts, and client communication from a single conversation. You can initiate everything from creating new project records to generating detailed financial reports without leaving your chat window.

A+ Quality Score 100/100

dubsado

crm-automation

project-lifecycle

invoicing-api

workflow-orchestration

client-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

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.

Dubsado MCP

12 tools available

Cloud-hosted on Vinkius

Stop jumping between tabs in your CRM just to check on a deal or send an invoice. This MCP lets you run your entire creative business through natural language commands, managing the full client lifecycle with your AI agent.

Your AI acts as your dedicated operations coordinator. Need to know if a contract was viewed? Ask it. Ready to bill a client? Tell it to create the invoice. You can list all active projects and pull up detailed metadata on anything from project status to contact history.

This connection gives you full control over everything from initial project setup through final billing. Because this MCP is hosted by Vinkius, your AI client gets access to a massive catalog of integrations, keeping you in one place for all your business needs.

Core Capabilities

01 — Create and update client projects

The agent can create new records, list all existing projects, or modify details like status tags and project metadata.

03 — Track contract status and agreements

The MCP allows you to check if a client viewed their agreement, retrieve its full details, or list multiple contracts in progress.

02 — Generate and retrieve invoices

You can ask the agent to create a brand-new invoice or pull up comprehensive details for any past billing record.

04 — Manage contact information history

You can pull up your complete directory of contacts and view the high-fidelity communication history for any individual client.

One Click on Vinkius — From Prompt to Execution

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

- 01 Subscribe to this MCP on Vinkius.
- 02 Grab your API key from your Dubsado dashboard (Settings > Marcus / API).
- 03 Use your AI client to talk to the connection. You can then manage everything—projects, billing, contracts—through natural conversation.

The bottom line is you get an instant operations layer over your existing business software without changing a thing about how you work now.

Built For

Creative entrepreneurs and small service-based teams who are tired of switching between their CRM, invoicing tool, and project tracker. If clicking through dashboards feels like half your workday, this is for you.

Freelance Designer

Creates a new project record for a client and immediately sends out the required contract.

Operations Lead (Small Agency)

Checks the signing status on several contracts at once, then triggers an automated sequence for projects that are overdue.

Creative Consultant

Retrieves detailed contact information and communication history to draft a scope of work before billing starts.

What Changes When You Connect

- 01 Stop manual tracking. Instead of checking project statuses across multiple dashboards, you can ask your agent to list all projects or get details on a specific one using the `get_project` tool.

-
- 02** Keep finances clean. You don't need to manually build invoices anymore. The `create_invoice` tool generates detailed invoices with line items and taxes instantly when prompted.
-
- 03** Never miss a contract deadline. Use `list_contracts` and `get_contract` to check the real-time signing progress of client agreements without logging into Dubsado.
-
- 04** Client data is centralized. The agent pulls from your entire directory via `list_contacts`, giving you instant access to contact details and history for any client.
-
- 05** Automate tedious follow-ups. Instead of remembering which next steps are due, the `apply_workflow` tool kicks off pre-set sequences right when a project hits a certain milestone.
-

Real-World Applications

I need to onboard a new client and bill them.

A consultant needs to get started with a big pitch. They ask their agent to create the initial project record using `create_project`, then request that the system generates a contract link via `list_contracts`. Once signed, they immediately prompt for an invoice draft using `create_invoice`.

A client project stalled after contract signing.

An operations lead notices a project is stuck. They prompt the agent to list all projects (`list_projects`) and then use the `update_project` tool to change its status tag, notifying the internal team immediately.

I need to know where all my money stands.

An agency owner needs quick financial health checks. They ask the agent to list all invoices (`list_invoices`) and then check the details of a specific pending invoice using `get_invoice` to verify amounts.

I need to pull data for a new proposal.

A designer needs context on an old client. They ask their agent to list contacts (`list_contacts`) and then retrieve all communication history for that individual, ensuring the next proposal is highly personalized.

Patterns to Avoid

Manual Data Aggregation

X AVOID

A user opens Dubsado to check project status, opens a separate sheet to list contacts, and then manually copies invoice numbers into an email draft.

✓ INSTEAD

Use your agent to coordinate this. First, ask it to ``list_projects`` and ``list_contacts``. Then, use the ``get_invoice`` tool to pull specific financial details, all within one chat session.

Ignoring Workflow Automation

X AVOID

The team manually sends follow-up emails after a contract is signed because they forgot to trigger the automated onboarding steps.

✓ INSTEAD

Instead of manual outreach, use ``list_workflow_templates`` and then execute them with the ``apply_workflow`` tool. This guarantees clients get all necessary steps immediately.

Using outdated project data

X AVOID

A user attempts to bill a client using an old invoice amount because they didn't check if the project details were updated.

✓ INSTEAD

Always verify current details. Use ``get_project`` first, then use that fresh metadata when prompted to execute ``create_invoice``. This keeps billing accurate.

The Right Fit

Use this MCP immediately if your business operations revolve around distinct phases: lead capture, contract signing, project execution, and invoicing. You need it when the status of one step (like a signed contract) directly dictates the action in the next step (like starting work or billing). Don't use it if you simply need to store unstructured notes about clients; for that, a dedicated note-taking tool is better. If your primary bottleneck is just communication—sending simple emails without tracking—a basic messaging service integration will do. But if you need structured data management across projects and finances, this MCP is required.

Dubsado MCP for AI Agents: Automating Project Lifecycle Management

Right now, managing client relationships means juggling at least three separate views in Dubsado: one for the project status board, one for the contact directory, and a third for all financial records. You constantly switch between 'view projects,' check if it's tagged correctly, then pivot to the 'contracts' tab just to see who signed. It's slow, and you lose context.

With this MCP, your agent handles that internal switching for you. Instead of clicking through menus, you simply ask: 'What is the status of the 'Brand Identity Refresh' contract?' The answer pops up immediately in your chat. You get a single source of truth without leaving your workflow.

Dubsado MCP for AI Agents: Streamlining Client Billing and Invoicing

The biggest time sink is usually billing. You have to check if the project is complete, find all the services rendered, verify any taxes, then manually generate a draft invoice. This process requires deep knowledge of where every piece of data lives.

Now, you just tell your agent: 'Create an invoice for Project XYZ.' It pulls the necessary line items and tax rates automatically, generating the record instantly. The entire billing cycle shrinks from 15 minutes to one command.

Dubsado MCP: 12 Tools for Project Lifecycle Management

Use these specific tools to manage everything from creating new records and listing contacts to generating detailed invoices and applying complex workflows.

#	TOOL	DESCRIPTION
01	<code>apply_workflow</code>	Automatically runs an established onboarding or project sequence for a specific client project.
02	<code>create_invoice</code>	Generates and records a new invoice, allowing you to specify the service description and applicable taxes.
03	<code>create_project</code>	Sets up a brand-new project record in your client directory.
04	<code>get_contract</code>	Pulls the current status and full details of a specific client contract.
05	<code>get_invoice</code>	Retrieves all financial details associated with an already created Dubsado invoice.
06	<code>get_project</code>	Fetches the complete metadata and status for any single project ID you provide.
07	<code>list_contacts</code>	Lists all client contacts in your system, giving you a directory view of everyone you work with.
08	<code>list_contracts</code>	Shows an overview list of multiple project contracts and their current status.
09	<code>list_invoices</code>	Retrieves a list of all invoices, helping you keep track of what's paid and what isn't.
10	<code>list_projects</code>	Lists every current project in your Dubsado account for a quick overview.
11	<code>list_workflow_templates</code>	Shows you all the available automated workflow templates you can apply to projects.
12	<code>update_project</code>	Changes details on an existing project, such as updating its status or adding a new tag.

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 my active client projects right now?



Active Projects Overview

- **Project Alpha:** Status: In Progress. Last Updated: 2 days ago. Tags: Design, Paid.
- **Winter Wedding:** Status: On Hold (Awaiting Deposit). Last Updated: Yesterday. Contract Signed: Yes.
- **Web Redesign Beta:** Status: Needs Review. Due Date: Oct 15th. Notes: Waiting on client assets.

U Can you create the invoice for the Web Redesign project?



Invoice successfully generated!

- **Client:** Acme Corp
- **Project ID:** proj_123
- **Line Items:** Design Services (\$5,000.00), Management Fee (\$500.00)
- **Total Due:** \$5,500.00
- **Invoice ID:** inv_456. I've queued this up to send when you give the go-ahead.

U Check on the contract for Project Alpha.



Checking contract status for 'Project Alpha'...

The client viewed the contract yesterday, but it is still marked as **'Pending Signature.'**

Would you like me to send a follow-up reminder email now?

Frequently Asked Questions

01 How can I use the Dubsado MCP for AI Agents to manage my client projects?

You can control your entire project lifecycle by talking to your agent. You can list all active deals, check specific project details, and even trigger automated follow-up workflows instantly.

02 Does the Dubsado MCP help with billing or invoicing?

Yes, it handles your finances. Your agent lets you generate new invoices, list all historical records, and check the full financial details of any project right from the chat interface.

03 Is this better than just logging into Dubsado manually?

Absolutely. Instead of clicking through tabs to find data, your agent pulls that information for you directly in conversation. It cuts out all the manual navigation and context switching.

04 Can I check contract status using this MCP?

Yes. You can ask your agent to get the current signing status of any client's agreement, telling you if it was viewed or if action is required.

05 What kind of roles use the Dubsado MCP for AI Agents?

This tool is ideal for freelance designers and small agency operations leads. Anyone whose job requires managing multiple client milestones, billing cycles, and contracts benefits from this automation.

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 `"dubsado": { "url": "..." }`



Windsurf

MCP Settings → `mcp_settings.json` → 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

Dubsado 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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