

MCP SERVER

NO CODE

CLOUD HOSTED

Dynamics 365 Finance & Operations MCP for AI Agents

Manage ledger journals, inventory, and sales orders in real-time.

Dynamics 365 Finance & Operations MCP connects your AI agent directly to Microsoft Dynamics 365 data. You can track real-time inventory levels across warehouses, analyze financial journals and ledger activity, and manage the full lifecycle of sales orders using natural language conversation.

A+ Quality Score 100/100

financial-journals

ledger-management

enterprise-resource-planning

inventory-control

sales-orders

business-operations



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.

Dynamics 365 Finance & Operations MCP

10 tools available
Cloud-hosted on Vinkius

This MCP puts the power of enterprise resource planning tools right into your AI workflow. Instead of logging into Dynamics 365 Finance & Operations to check multiple screens for status updates, you talk to your agent. You'll get instant access to complex data like ledger journals and inventory on-hand quantities. Need to know if a specific sales order is open or invoiced? Ask. Want a high-level view of all vendor activity across different legal entities? Your AI client pulls it together for you. It lets you manage the entire enterprise resource planning cycle—from checking stock levels to auditing financial metadata—all through conversation. Since Vinkius hosts this MCP, your agent connects once and gains access to core business intelligence that used to take an hour of clicking around.

Core Capabilities

01 — Retrieve inventory counts across warehouses

The MCP retrieves the current count of available products across all warehouses.

03 — Manage vendor and customer records

The MCP pulls complete lists of all registered enterprise customers and suppliers from the account.

05 — Generate operational summaries

The system provides a summary combining recent sales activity with current stock levels.

02 — List and search for sales orders

You can find detailed information on specific customer sales orders or list all headers in your system.

04 — Audit financial journals

Retrieve records for ledger journals, checking posting status and organizational metadata.

One Click on Vinkius — From Prompt to Execution

Available at vinkius.com/mcp/dynamics-365-finance-operations — connect your AI agent in three steps.

- 01** Connect this MCP to your AI client and authorize access using the required Azure AD credentials (Client ID, Tenant ID, etc.).
- 02** Your agent establishes a secure connection to your Dynamics 365 environment's OData endpoints.
- 03** You prompt your AI client in natural language; it translates that request into specific API calls to pull the required financial or inventory data.

The bottom line is, you don't have to learn a new ERP interface. You just talk to your agent and get the answers from Dynamics 365.

Built For

This MCP is built for professionals drowning in enterprise data—finance managers who need ledger status instantly, or supply chain leads needing real-time inventory counts without logging into multiple dashboards.

Supply Chain Lead

You monitor vendor activity and check inventory levels across dozens of warehouses using chat prompts instead of complex reporting queries.

Finance Manager

You quickly audit ledger journals or verify the posting status for multiple legal entities on demand, saving hours spent in manual checks.

Operations Analyst

You research specific customer order details or organizational ERP metadata to troubleshoot problems without needing access credentials for every module.

What Changes When You Connect

- 01** Checks inventory across multiple locations instantly. You don't have to manually check warehouse reports; just ask the agent for `get_inventory_on_hand` and get a unified count.

-
- 02** Streamlines financial auditing. Instead of jumping between tabs, your agent can list ledger journals or get high-level summaries using the `quick_finance_health_audit` tool.
-
- 03** Reduces order lookup time significantly. You can search for specific customer orders with `search_sales_orders`, finding details by number or keyword in seconds.
-
- 04** Maintains a complete view of your network. Easily list all registered vendors (`list_d365_vendors`) and customers (`list_d365_customers`) without exporting CSVs.
-
- 05** Provides deep transaction visibility. You can check the full details of any single order using `get_sales_order_details` to understand line items and status.
-

Real-World Applications

Checking inventory availability for a large client shipment

A supply chain lead needs to confirm stock levels before promising delivery dates. Instead of running three manual reports, the agent uses `get_inventory_on_hand` and immediately confirms product 'P001' has 45 units available across all warehouses.

Finding an old sales order for payment verification

An operations analyst needs details on a sale from last quarter. They use `search_sales_orders` with the customer name, instantly pulling up 'SO-7766' and seeing its current invoicing status.

Auditing an unexpected financial discrepancy

A finance manager spots a strange ledger entry. They ask the agent to `list_ledger_journals`, quickly narrowing down the problem area by checking posting statuses and organizational metadata, saving hours of manual investigation.

Reviewing vendor compliance before a contract renewal

A procurement specialist needs to audit all suppliers. They use `list_d365_vendors` to get the full list, confirming contact details and active records for every potential partner.

Patterns to Avoid

Treating it like a simple database query

X AVOID

Trying to ask, 'Give me all open orders,' but forgetting to specify the customer or date range. The result is overwhelming and unusable data.

✓ INSTEAD

Always refine your prompt. Use ``list_d365_sales_orders`` first to see headers, then follow up by asking for specific details on a subset of those orders using ``search_sales_orders``.

Assuming real-time data is available everywhere

X AVOID

Asking about inventory levels without knowing if the product has passed Quality Assurance. You get inaccurate stock counts.

✓ INSTEAD

When checking stock, always confirm the product status first by listing released products using ``list_released_products`` before calling ``get_inventory_on_hand``.

Overlooking necessary metadata checks

X AVOID

Assuming a sales order is finalized just because it exists, without checking its posting status.

✓ INSTEAD

After reviewing any financial record, always ask the agent to check the ledger journal status or use ``quick_finance_health_audit`` for context.

The Right Fit

Use this MCP if your job requires constant switching between operational data (inventory counts, order statuses) and deep financial records (ledger journals, posting metadata). It's perfect when you need an 'all-in-one' view of the business lifecycle. Don't use it if you just need to read a static document or perform simple calculations outside the ERP system; those tasks are better suited for generic calculation tools. If your goal is pure data visualization (e.g., building complex charts from scratch), consider using a dedicated BI tool connector instead.

Dynamics 365 Finance & Operations: Managing Financial Journals and Ledger Activity

Today, checking the financial health of an enterprise means logging into Dynamics 365, navigating to the General Ledger module, and manually running reports to audit journal statuses. You spend time clicking through legal entities just to confirm if a batch of transactions posted correctly or if there's a discrepancy in metadata.

With this MCP, you simply ask your agent to check the ledger journals. It pulls that complex data instantly, giving you an immediate status report on posting and organizational financial records. You get real-time auditing visibility without leaving your chat window.

Dynamics 365 Finance & Operations: Tracking Inventory and Sales Orders

Manual inventory tracking involves running separate reports for every warehouse, then cross-referencing those numbers against open sales orders. This process is slow and highly prone to human error—you might miss a pending stock adjustment or an order that's awaiting final QA.

This MCP pulls it all together. You can check `get_inventory_on_hand` for the current count, then immediately use `search_sales_orders` to see which specific orders are dependent on that stock level. It links physical assets directly to pending revenue.

Dynamics 365 Finance & Operations: 10 Tools for Financial Data Retrieval

Use these tools to pull real-time data on everything from product stock levels and customer lists to complex ledger journal entries.

#	TOOL	DESCRIPTION
01	<code>get_d365_fo_metadata</code>	Retrieves technical information about the current Dynamics 365 environment you're connected to.
02	<code>get_inventory_on_hand</code>	Checks and reports the real-time quantity of products currently stored across all warehouses.
03	<code>quick_finance_health_audit</code>	Gives a summarized view combining recent sales activity, stock levels, and organizational health data.
04	<code>get_sales_order_details</code>	Fetches complete information for one specific sales order number.
05	<code>list_d365_customers</code>	Lists all active customer records stored within your enterprise account.
06	<code>list_ledger_journals</code>	Provides a list of ledger journals and their respective header information for auditing purposes.
07	<code>list_released_products</code>	Retrieves a catalog listing of all products that are available for sale or use in your business processes.
08	<code>list_d365_sales_orders</code>	Generates a list of all sales order headers currently recorded in the system.
09	<code>list_d365_vendors</code>	Lists every vendor record maintained in your Dynamics 365 account.
10	<code>search_sales_orders</code>	Searches for sales orders using either a specific order number or a customer keyword.

See It in Action

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

U How many units of product 'P001' do we have left across all warehouses right now?



Inventory Status: Product P001 (High-Speed Hub)

- **Total On Hand:** 45 Units
- Warehouse East: 30 Units
- Warehouse West: 15 Units

Do you need me to check for any expected incoming shipments or pending adjustments?

U I need a quick audit of the last five sales orders and their financial status.



Financial & Order Summary

SO #	CUSTOMER	STATUS	TOTAL VALUE
SO-105	Acme Inc.	Invoiced	\$9,500
SO-101	Global Corp	Open	\$22,000
SO-988	Beta Solutions	Pending	\$3,100

Note: The open order requires confirmation before invoicing.

- U** List all active customers and tell me which ones have any pending sales orders.



Customer & Order Report

We found 52 registered customers. Two of them, Tech Corp and Global Logistics, currently have open or backordered sales activity:

- **Tech Corp:** (3 Open Orders)
- **Global Logistics:** (1 Backordered Item)

Would you like the detailed status for Tech Corp's oldest order?

Frequently Asked Questions

01 Can Dynamics 365 Finance & Operations MCP help me track inventory across multiple locations?

Yes, it pulls real-time stock counts from all your warehouses in one go. You can get the current quantity of any product using a single prompt, which is much faster than running separate reports.

02 What if I need to audit ledger journals but don't know the exact posting status?

The MCP lets you list all your ledger journals and their headers. You can then ask for a summary of posting statuses across different legal entities, giving you a quick financial health check.

03 How do I find details on a sales order if I only know the customer name?

You don't need an ID. You can search for sales orders using keywords like a customer name or partial order number, and the agent will pull up all matching records.

04 Is Dynamics 365 Finance & Operations MCP only for finance people?

No. Supply chain leads use it to monitor inventory levels, while operations teams use it to research specific customer order details, making it useful across multiple departments.

05 What if I need a summary of sales activity and stock levels at the same time?







The MCP has tools that generate high-level summaries. You can get a quick snapshot combining recent sales volume with current available product stock, saving you multiple report runs.

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>"dynamics-365-finance-operations": { "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

Dynamics 365 Finance & Operations 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 Dynamics 365 Finance & Operations. 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	Dynamics 365 Finance & Operations MCP
Server ID	019d758a-d4d4-73b9-a60b-031d3de26eec
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/dynamics-365-finance-operations.