MCP SERVER | NO CODE | CLOUD HOSTED

EngageBay All-in-One CRM MCP

Manage Contacts, Deals, and Tasks from Chat.

EngageBay All-in-One CRM instantly connects your AI agent to manage all customer relationships and sales data. Your agent can list contacts, track deal pipelines, monitor outstanding tasks, and audit organizational records using simple conversation. It's a single point of access for every part of your marketing, sales, and service workflow.

A+ Quality Score 100/100

contact-management | sales-pipeline | helpdesk | lead-generation | marketing-automation | business-growth

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vinkius.com/mcp/engagebay-all-in-one-crm

SCAN TO VIEW

The infrastructure that powers AI agents in the real world.

Vinkius connects AI to the world's software through secure, enterprise-grade infrastructure — enabling real-world execution at scale, built on the Model Context Protocol (MCP).

Your AI Connections Run Through Vinkius Cloud

The world's largest managed MCP catalog

Vinkius is the cloud infrastructure where AI agents connect 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.

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.

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.

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	Ed25519	24h TTL	V8 Isolate
Encryption at rest	PKI vault signatures	Ephemeral session keys	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.

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.

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.

06 — Honeytoken Trap System

Phantom credentials are injected into isolated environments. If a honeytoken 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.

Agent Activity

Which AI clients are connecting, how often, and what they're doing — real-time session tracking.

FinOps

Cost tracking per tool, payload compression savings, budget optimization signals, and consumption trends.

Tool Health

Slowest and most error-prone tools, with actionable root-cause insights and performance baselines.

Firewall & DLP

PII redaction activity, sensitive data protection counters, and security event timeline.

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.

EngageBay All-in-One CRM MCP

10 tools available
Cloud-hosted on Vinkius

Your AI client now talks directly to EngageBay, the all-in-one CRM platform. This MCP lets you manage everything from customer profiles to complex deal pipelines without opening a single tab. Need to know who bought what and when they need a follow-up? Just ask your agent. You can pull comprehensive contact lists, monitor which sales deals are close to closing, or get an instant status report on overdue tasks. Because this data is centralized through the Vinkius catalog, you don't have to worry about juggling multiple integrations; you just talk to your agent and it handles the backend work across your entire customer lifecycle. Whether you're planning a campaign or checking up on next quarter's sales targets, all that critical business intelligence is available via natural conversation.

Core Capabilities

01 — Retrieve detailed contact profiles

Get full history and profile information for any specific customer or prospect.

02 — Track the entire sales pipeline

View current opportunities, assess deal values, and check expected closing dates for active deals.

03 — List and manage outstanding tasks

Pull up all scheduled follow-ups, reminders, and CRM action items assigned to the account.

04 — Audit overall business health metrics

Request high-level summaries of your total contact volume, sales performance, or task backlog at a glance.

05 — View organizational records

List and pull details on companies and organizations associated with your contacts.

One Click on Vinkius — From Prompt to Execution

Available at **vinkius.com/mcp/engagebay-all-in-one-crm** — connect your AI agent in three steps.

01 Connect the EngageBay integration to your AI client through Vinkius.

02 Authorize access using your API key in the client settings.

03 Ask your agent a question, like 'What deals are due next week?', and it returns structured data.

The bottom line is you use natural conversation instead of complex menu navigation to get CRM answers.

Built For

Anyone who spends more than ten minutes a day switching between the CRM dashboard, email client, and task list needs this. This MCP is for people tired of manual data compilation.

Account Executive (Sales)

Checking deal statuses or listing recent opportunities before calling a prospect.

Marketing Manager

Researching contact profiles and subscription status during campaign planning, without leaving the chat window.

Operations Analyst (Ops)

Running quick audits of CRM health—checking total task volume or identifying company records that haven't been updated in months.

What Changes When You Connect

01 Stop running manual reports. You can use the `quick_crm_volume_audit` to get a high-level count of contacts, deals, and tasks in one single prompt.

02 Need context on a lead? Instead of digging through pages, run `get_contact_profile` to pull up their entire interaction history instantly.

03 Don't forget the follow-up. Use `list_crm_tasks` to see every overdue or pending action item across your accounts when you need it most.

04 Keep track of revenue by using `list_sales_deals` to get a complete view of all open opportunities in your pipeline.

05 Finally close out the book on successful sales. The tool `list_successfully_closed_deals` lets you pull reports only on deals that are already marked 'Won'.

06 Build a company map using `list_crm_companies` to see all the organizations associated with your contacts.

Real-World Applications

Preparing for a quarterly review of sales performance.

The operations analyst runs `quick_crm_volume_audit` and then uses `list_sales_deals` to get the total number of active opportunities. They follow up by running `list_successfully_closed_deals` to compare current activity against historical wins, all in a single chat session.

A marketing team needs to vet a new prospect before a meeting.

Instead of searching the database, the marketer prompts their agent to run `get_contact_profile` on the lead's email. The agent returns not just basic info, but also notes about past interactions and company details retrieved via `list_crm_companies`.

An account executive needs to prioritize follow-ups for a complex client.

The AE asks the agent to list all pending tasks using `list_crm_tasks`. They then ask for details on the most important deal, prompting the agent to use `get_deal_details` for context.

An analyst needs a quick overview of recent company growth.

The analyst asks the agent to find all deals that were recently updated by running `list_latest_sales_opportunities`. This quickly shows which accounts are active and need immediate attention.

Patterns to Avoid

Treating it like a simple search engine.

✗ AVOID

Typing 'john doe contact' and expecting the agent to return everything. The agent will only give basic information without context or history.

✓ INSTEAD

You need specific tools for deep data. To get John Doe’s full story, ask the agent to use `get_contact_profile`. For a summary of his company, list all organizations using `list_crm_companies` first.

Trying to get a status update on one deal at a time.

✗ AVOID

Asking 'What is the status of Deal X?' five different times. This wastes tokens and makes the chat messy.

✓ INSTEAD

Use `list_sales_deals` first to see all active deals, then ask the agent to use `get_deal_details` on the specific deal name in a single prompt.

Ignoring task deadlines and just asking for ’open items’.

✗ AVOID

Asking 'What tasks do I have?' which might miss due dates or context. This gives vague, unprioritized information.

✓ INSTEAD

Always use `list_crm_tasks` to get a structured list of all pending follow-ups and deadlines. It provides the full scope of your next actions.

The Right Fit

Use this MCP if your workflow requires linking contacts, sales opportunities, and tasks together in one conversation. This is ideal for account management roles who need a holistic view—for example, 'Show me John Doe's profile, list his active deals, and what tasks are due next week.' Don't use this if you only need to pull raw data into an external spreadsheet (a dedicated export tool might be better). Also, don't rely on it for complex financial modeling; the MCP is designed for operational data retrieval. If your primary need is just listing *all* contacts without any context about their deals or tasks, `list_crm_contacts` handles that specific job well.

The manual dance of jumping between tabs and reports.

Right now, if you need a full picture of an account, you're doing a little data scavenger hunt. You jump to the contacts tab for profiles, switch to the deals section to check pipeline status, then open your calendar view just to see overdue tasks. It's clicking through five different dashboards and copy-pasting key figures into an email summary.

With this MCP, you skip the clicks. You talk to your agent instead. You ask for a full picture—like 'How is Global Tech Inc doing?'—and it pulls together the contact details, the current deal status, and any open tasks instantly. It's one conversation that replaces five separate reports.

EngageBay All-in-One CRM MCP: Getting a Complete Data Picture

Before this MCP, getting a comprehensive view meant running three separate processes: pulling the contact roster via one report, then exporting all active deals from another module, and finally compiling task lists manually. This was slow, error-prone work.

Now, you simply ask your agent to perform these actions in sequence—for example, listing contacts using `list_crm_contacts` and comparing them against the data retrieved by `quick_crm_volume_audit`. You get the full context without ever touching a report builder.

EngageBay All-in-One CRM: 10 Tools Available

Use these tools to pull specific data points from your EngageBay account, whether you need a single contact's history or an audit of all open deals.

#	TOOL	DESCRIPTION
01	`get_engagebay_account_metadata`	Retrieves information about your EngageBay account limits and overall metadata.
02	`get_contact_profile`	Provides a full history and detailed profile for one specific contact.
03	`get_deal_details`	Fetches the precise settings, value, and current stage of a single sales deal.
04	`quick_crm_volume_audit`	Gathers a quick summary count for contacts, deals, and tasks across your account.
05	`list_crm_companies`	Pulls a list of all organizations or companies tracked in the CRM.
06	`list_crm_contacts`	Generates a full, comprehensive roster of every contact record in your system.
07	`list_sales_deals`	Retrieves a list of all current sales opportunities and deals.
08	`list_latest_sales_opportunities`	Identifies the most recently created or modified sales deals in your pipeline.
09	`list_crm_tasks`	Lists every outstanding task, follow-up item, and scheduled reminder across the account.
10	`list_successfully_closed_deals`	Identifies deals that have already reached a 'Won' or 'Closed' status.

See It in Action

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

U List all active sales deals.

I've found 8 active deals, including 'Enterprise Upgrade' ($12,000) and 'SMB Consultation' ($2,500). 3 deals are in the 'Discovery' stage and 2 are in 'Proposal'. Would you like the details for the Enterprise Upgrade?

U Show me the contact profile for 'john.doe@example.com'.

John Doe is associated with 'Global Tech Inc' and is currently 'Subscribed'. Their last interaction was a task completed on March 15th. Should I pull their full custom field history?

U What are my upcoming CRM tasks?

You have 5 upcoming tasks, including 'Follow up with Sarah Connor' (Due Tomorrow) and 'Send Proposal to Wayne Corp' (Due Friday). Should I list the customer contact details for Sarah Connor?

Frequently Asked Questions

01 **How do I check my deal pipeline status with EngageBay All-in-One CRM MCP?**

You use `list_sales_deals` to see every opportunity. For deep dives on a specific deal, ask your agent to run `get_deal_details`.

02 **Can I get the full history of a contact using EngageBay All-in-One CRM MCP?**

Yes, you use the `get_contact_profile` tool. It pulls up detailed profiles and interaction histories for any specific person.

03 What if I want to see all my overdue tasks in EngageBay All-in-One CRM MCP?

Use the `list_crm_tasks` tool. This lists every scheduled follow-up and reminder, allowing you to prioritize your day.

04 Does EngageBay All-in-One CRM MCP allow me to list all companies?

Yes, running `list_crm_companies` retrieves a full roster of every organization tracked in the CRM system.

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 `"engagebay-all-in-one-crm": { "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

EngageBay All-in-One CRM 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 →

VINKIUS

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