

MCP SERVER

NO CODE

CLOUD HOSTED

Insightly MCP

Track contacts, opportunities & projects from your agent.

Insightly connects your AI agent directly to your CRM data. It lets you list, retrieve, and manage contacts, organizational records, sales opportunities, and active projects all from one place. Use it to track leads, monitor pipeline status, or pull specific user details without logging into the Insightly interface.

A+ Quality Score 100/100

contact-management

opportunity-tracking

sales-pipeline

project-tracking

lead-management

crm-automation



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.

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.

Insightly MCP

10 tools available

Cloud-hosted on Vinkius

This MCP gives your agent full access to your core customer relationship data. You can ask it to list every contact in the system, check for new marketing leads, or find out who's working on which project—all instantly. Need to know all current sales opportunities? It pulls that report directly from Insightly. This makes automating complex sales and project workflows much simpler. When you connect this MCP through Vinkius, your agent knows exactly how to speak the Insightly language, letting you focus entirely on what needs doing next.

Core Capabilities

01 — Retrieve specific contact details

Get all the necessary information for a single person or account record.

02 — List and filter contacts and leads

Generate comprehensive lists of every contact in your system, or check for newly generated marketing leads.

03 — Manage sales pipeline data

Pull detailed reports on all active organizations and current sales opportunities across different stages.

04 — Track projects and tasks

List every active or past project, along with all related tasks assigned to the team.

05 — View system users and teams

Get a full directory of all defined user accounts and organizational teams within Insightly.

One Click on Vinkius — From Prompt to Execution

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

- 01 Your agent initiates a request by stating what data it needs, such as 'list my contacts' or 'get the details for Acme Corp'.
- 02 The MCP translates that plain language command into a structured query and executes the operation against the Insightly API.
- 03 You receive a clean, formatted dataset containing only the specific information requested (e.g., all project names and associated deadlines).

The bottom line is you get CRM data—organized and usable—without writing any code.

Built For

This MCP is for Sales Operations Managers, Project Coordinators, and Account Executives who spend too much time cross-referencing data across different dashboards. If your job involves keeping track of who needs to talk to whom, or if you manage multiple client projects, this connector saves hours.

Account Executive

Uses the MCP to quickly retrieve contact details and check the status of existing opportunities before calling a prospect.

Project Manager

Runs queries against the system to list projects, view associated tasks, and confirm which teams are assigned to specific clients.

Sales Operations Analyst

Automates reporting by running bulk checks on all leads or listing organizations to find gaps in the sales pipeline data.

What Changes When You Connect

- 01 Get a full picture of sales status. Instead of running separate reports, you can ask the agent to list all opportunities and filter them by stage using the `list_opportunities` tool.

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- 02** Streamline contact research. You don't need to search page-by-page; simply use `get_contact` or `list_contacts` to pull specific details on any client instantly.
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- 03** Manage project scope easily. Quickly list all active and past projects using `list_projects`, giving your agent the necessary context before planning a status update.
-
- 04** Identify new sales chances automatically. The MCP lets you run `list_leads` to capture marketing leads as soon as they are generated, keeping your pipeline full of fresh names.
-
- 05** Maintain operational awareness. You can use `list_tasks` and `list_teams` together to see who is responsible for which project tasks across the company.
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Real-World Applications

The PM needs a status report on multiple client projects.

A Project Manager asks their agent: 'What are all active projects and what tasks are due next week?'

The agent uses `list_projects` and then calls `list_tasks`, providing the PM with one cohesive, prioritized list that spans every project.

The Sales Director needs to audit user access for compliance.

A Sales Director asks their agent: 'Show me all users and which teams they belong to.' The agent executes `list_users` and `list_teams`, generating a clear matrix of permissions.

The AE needs to quickly vet a new lead before calling.

An Account Executive asks their agent: 'Find me all marketing leads from last month and tell me if any are associated with an organization.' The agent uses `list_leads` and cross-references the data against `list_organisations`.

The Ops Analyst needs to track recent system changes.

An analyst asks their agent: 'List the most recent events on our calendar.' The agent uses `list_events` to pull all scheduled activities, ensuring no critical meeting is missed.

Patterns to Avoid

Copying data between tabs

✗ AVOID

Opening the Contacts tab, copying 10 names. Switching to the Opportunities tab, manually pasting them into a spreadsheet and trying to match project IDs.

✓ INSTEAD

Instead, ask your agent to run `list_contacts` followed by running `list_opportunities`. The MCP handles all the matching and data collation for you.

Running disconnected reports

✗ AVOID

Generating a 'Project List' report on Monday, then going back on Friday to generate a separate 'Task Status' list. You have two spreadsheets that might conflict.

✓ INSTEAD

Use the agent to run `list_projects` and immediately follow it with `list_tasks`. This keeps the data context together in one single API call.

Manual user account checking

✗ AVOID

Going through the admin panel, clicking on every team name, then clicking into each team to see who is a member. Takes forever.

✓ INSTEAD

Simply ask your agent to execute `list_users` and `list_teams`. It compiles this structure in seconds.

The Right Fit

Use this MCP if your workflow requires querying or assembling data from disparate Insightly records, like pulling a contact's details alongside their associated project tasks. You need the agent to act as an API wrapper for your CRM. Don't use it if you only need to read one specific report type—for instance, if you just want a simple list of all users, running `list_users` is enough; don't ask for everything at once. If your goal is deep data transformation (e.g., writing Python code based on the data), consider a specialized coding agent after using this MCP to extract the raw facts.

The daily headache of manual CRM reporting.

Right now, getting a full picture requires jumping through hoops. You open the Contacts tab for names, switch over to the Opportunities tab for value estimates, and then toggle to Projects just to see if the client is active or stalled. You spend twenty minutes clicking between tabs and copy-pasting IDs into an external spreadsheet, hoping you didn't miss a crucial link.

With this MCP, you tell your agent what you need—for example, 'Give me all contacts for projects over \$50k.' The system handles the cross-referencing of Contacts, Opportunities, and Projects in one go. You get a single, clean output ready to read or process.

Insightly MCP gives you direct access to your project data.

You no longer have to open the Project dashboard, remember which IDs correspond to specific clients, and then manually check the related tasks. You simply ask for a list of all projects and their associated tasks via `list_projects` and `list_tasks`, getting everything in one structured output.

The data moves from being siloed across multiple Insightly views into a single, usable stream directly into your agent's memory.

Insightly MCP with 10 Tools


Use these tools to programmatically interact with your core CRM data. Your agent can pull everything from contact lists to project statuses.

#	TOOL	DESCRIPTION
01	<code>get_contact</code>	Retrieves detailed records for one specific contact.
02	<code>list_contacts</code>	Lists every single contact recorded in the system.
03	<code>list_events</code>	Provides a list of all calendar events associated with the account.
04	<code>list_leads</code>	Lists all marketing leads that have entered the system.
05	<code>list_opportunities</code>	Generates a list of current and past sales opportunities.
06	<code>list_organisations</code>	Lists every registered organization in your CRM.
07	<code>list_projects</code>	Provides a directory of all active and completed projects.
08	<code>list_tasks</code>	Gathers a list of all outstanding tasks across various projects.
09	<code>list_teams</code>	Lists every defined internal team within the organization structure.
10	<code>list_users</code>	Lists all user accounts that have access to the system.


See It in Action

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


U List all contacts in Insightly.

 I'll fetch your CRM contact directory for you.

U Show me active projects in my Insightly account.

 I'll retrieve the list of active and past projects from Insightly.

U Check for any new sales opportunities.

 I'll look up the current sales opportunities in your account.

Frequently Asked Questions

01 How do I get individual contact information using the Insightly MCP?

You use the ``get_contact`` tool. This function takes a specific identifier, like an email or ID number, and pulls up all related details for that one person.

02 Can I list leads and contacts separately with Insightly MCP?

Yes. You can run ``list_leads`` to see incoming marketing interest, and then use ``list_contacts`` if you need the full directory of established users in your system.

03 What is the difference between listing projects and listing tasks with Insightly MCP?

The `list_projects` tool gives you the high-level overview (the project name, goal, timeline). The `list_tasks` tool drills down into that, giving you specific action items and who owns them.

04 Does Insightly MCP help with sales opportunities?

Yes. You use the `list_opportunities` tool to see every potential sale currently in the pipeline, letting your agent track progress across stages for you.

05 If I need user directory info, which Insightly MCP tool do I use?







You should run `list_users`. This provides a comprehensive list of every account that has access to the Insightly system, making it easy to audit permissions.

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>"insightly": { "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

Insightly 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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