MCP SERVER | NO CODE | CLOUD HOSTED

Karbon MCP

Manage Client Records and Project Workflows in Your Chat.

Karbon: Manage your entire accounting firm's operations, contacts, and projects directly through any AI agent. This MCP lets you instantly view client history, track staff availability, and automate work item creation without leaving your chat interface.

A+ Quality Score 100/100

practice-management | workflow-automation | accounting-software | task-management | client-collaboration

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vinkius.com/mcp/karbon

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.

Karbon MCP

12 tools available
Cloud-hosted on Vinkius

This connector gives your agent deep access to Karbon's practice management features. Instead of jumping between tabs or logging into multiple systems, you can ask for specific data—like listing all contacts (both people and organizations) or checking historical notes on a client profile—and get it instantly. You can automate project tracking by creating new work items or reviewing the status and tasks associated with existing projects. Plus, your agent knows who's available right now by querying users and firm members. Connecting Karbon through Vinkius gives you one place to manage all these operational details using any compatible AI client.

Core Capabilities

01 — Manage Client Records

List, retrieve, or create contacts for people and organizations so your records stay clean.

02 — Automate Project Workflows

Create new projects, list existing work items, and track associated tasks to keep engagements on schedule.

03 — Check Team Availability

Query the firm database to find out which users are assigned to a project or who is available right now.

One Click on Vinkius — From Prompt to Execution

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

01 Subscribe to this MCP and provide your Karbon Access Key and Bearer Token.

02 Connect the credential set to your preferred AI agent (like Claude or Cursor).

03 Ask your agent a natural language question—for instance, 'What are the pending tasks for Acme Corp?'—and it handles the rest.

The bottom line is you get all of Karbon's operational data exposed as tools your AI client can use through Vinkius.

Built For

Anyone running a professional service firm—especially accounting or consulting. You're the owner who spends too much time compiling status reports, or the project manager whose day is spent hunting for client details across different systems.

Accounting Firm Owner

You use this to get a quick overview of team performance and overall work progress without having to manually check every employee's dashboard.

Project Manager

On a Tuesday afternoon, you ask your agent to list all open projects and then create new tasks for the next quarter. It handles both steps automatically.

Client Relationship Manager

Before a big client meeting, you instantly retrieve historical notes on the contact profile so you never forget a critical detail.

What Changes When You Connect

01 Stop manually checking client records; you can instantly list all people or organizations using the `list_people` or `list_organizations` tools, giving your agent a complete picture of who's involved.

02 Eliminate status report compiling. You can ask to get details for a specific work item or use `list_work_tasks` to see exactly what needs doing on any project right now.

03 Never miss client context again. By asking to list notes for a contact, your agent pulls all historical comments and records into one place before you even open the CRM.

04 Stay informed about team capacity. You can query users via `list_users` so your agent knows who's available to take on a new project or task.

05 Quickly set up new work. Instead of logging in, you simply ask your agent to create a work item, and it handles the whole setup using the `create_work_item` tool.

Real-World Applications

Onboarding a New Client

A client manager needs to prepare for a kickoff meeting. They ask their agent to list all contacts, find the primary organizational contact, and then pull up any historical notes on that account before they even walk into the room.

Project Status Check

A project manager needs to report progress. They simply tell their agent the work item key, and it retrieves all detailed information for that specific work item, listing both associated tasks and current status updates in one response.

Team Resource Allocation

The firm owner needs to assign a new client project. They ask their agent to list users and then filter by availability, so they know exactly which team member is free right now without calling them directly.

Updating Client Info

A contact changes roles at the company. The manager asks their agent to get the detailed information for that specific contact and then update the work item so all records reflect the new title.

Patterns to Avoid

Trying to find old client details.

✗ AVOID

Opening the main CRM, clicking through multiple tabs, searching by name, and hoping the notes section is still there. It's a massive time sink.

✓ INSTEAD

Just ask your agent to list contact notes for that person or organization; it gathers all historical comments immediately.

Starting a project from scratch.

✗ AVOID

Opening the work item screen, figuring out what type of project it is, and then manually filling in every required field.

✓ INSTEAD

Tell your agent to create a new work item; you just need to give it a title and type.

Checking who needs to do what.

✗ AVOID

Going to the team dashboard, clicking on each employee's name, and reviewing their assigned tasks one by one. It takes forever.

✓ INSTEAD

Ask your agent to list users in the firm; it gives you a quick roster of assignees and who is available.

The Right Fit

Use this MCP if managing interconnected data across people, organizations, projects, and tasks is core to your daily job. You need to ask questions like, 'What is the status of Project X for Client Y?' or 'Who can take over this task?' If your workflow involves looking up specific roles, checking historical notes on a contact, or creating structured work items, this tool set works for you. Don't use it if all you need to do is send an email or look at a simple spreadsheet; then, a dedicated messaging or sheet connector will be better. This MCP shines because it ties together the entire operational context of your firm.

The headache of jumping between tabs and screens.

Today, keeping up with client details means bouncing between the main contact view, the notes history, the project tracker, and the staff roster. You open one tab to check a person's name, jump to another to see the work item status, then click a third just to read old comments—it’s constant context switching that kills your focus.

With this MCP, you talk to your agent instead. You ask it to find an organization, retrieve its contact notes, and check which team members are available for follow-up. It pulls the full picture together in one conversation.

Karbon provides a unified view of client and project data.

You no longer have to manually cross-reference who worked on what, when, or why. Instead of separate searches for people, organizations, and tasks, you can ask the agent to list all work items and then drill down into their associated tasks instantly.

The system now knows your firm's whole landscape—from contacts to team members to current projects—and it delivers that information directly when you need it.

Karbon: 12 Tools for Practice Management

These tools let you list, create, read, and update every core element of your accounting firm's workflow, from contacts to projects.

#	TOOL	DESCRIPTION
01	`list_contacts`	Retrieves a broad list of all people and organizations in your firm's contacts.
02	`create_contact`	Adds a brand new contact to Karbon, specifying whether it's a Person or an Organization.
03	`create_work_item`	Starts a new project or work item in Karbon, requiring only a title and type.
04	`get_contact`	Fetches complete details for a single specific contact record.
05	`get_work_item`	Retrieves all detailed information for one specific project or work item.
06	`list_contact_notes`	Shows all historical notes and comments associated with a given client or associate profile.
07	`list_organizations`	Lists only the organizational contacts in your firm.
08	`list_people`	Lists only individual people contacts, like employees or clients.
09	`list_work_tasks`	Shows all specific tasks attached to a particular project or work item.
10	`update_work_item`	Changes the details of an existing work item that needs adjustment.
11	`list_users`	Gets a list of every user in the firm, helping you identify assignees and team members.
12	`list_work_items`	Lists every active workflow and engagement currently tracked by the firm.

See It in Action

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

U List all my organizational contacts in Karbon.

I've retrieved 12 organizational contacts from your Karbon account, including 'Acme Corp', 'Global Logistics', and 'Innovate Tech'. Would you like to see more details for any of them?

U Show me the tasks for the work item with key 'WORK_123'.

I found 8 tasks for work item 'WORK_123'. Current pending items include 'Review Tax Documents' and 'Client Interview'. 5 tasks are already completed.

U Create a new organization contact named 'Tech Pioneers'.

Successfully created the organization 'Tech Pioneers' in your Karbon contacts. The unique key assigned is 'CONTACT_987'.

Frequently Asked Questions

01 **How do I check contact details using the Karbon MCP?**

You use the `get_contact` tool. You just give your agent the specific contact's key, and it pulls up all their detailed information for you.

02 **Can I list multiple client organizations with this MCP?**

Yes, you can use the `list_organizations` tool to get a comprehensive overview of every organization record in your firm right away.

03 **What if I need to update an existing project? Do I use the Karbon MCP for that?**

Absolutely. You can call the `update_work_item` tool, allowing you to change details on a current or past project without needing direct access to the Karbon interface.

04 **Does Karbon MCP help me track team members?**

Yes. The `list_users` tool lets your agent pull a complete list of all firm users, helping you identify who is available or assigned where.

05 **How does the Karbon MCP handle project tasks?**

It handles them through several tools. You can use `list_work_tasks` to see what's pending on a project, and even `create_work_item` if you need to start one.

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 `"karbon": { "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

Karbon 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.com · support@vinkius.com

VINKIUS

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