

MCP SERVER

NO CODE

CLOUD HOSTED

Nutshell CRM MCP

Get instant answers on client data via chat.

Nutshell CRM gives your AI agent direct access to your sales pipeline and client data inside Nutshell. You can list, search, and deep-dive into accounts, contacts, and leads without leaving your chat window. Track activity logs, view custom fields, or pull comprehensive reports just by asking.

A+ Quality Score 100/100

crm

pipeline-management

b2b-sales

contact-management

lead-tracking

sales-forecasting



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.

Nutshell CRM MCP

10 tools available

Cloud-hosted on Vinkius

Need to know the status of a specific deal or check a contact's full history? This MCP connects your agent straight into Nutshell CRM. You stop having to jump between the web app and your AI client. Now, you can ask natural questions—like 'Show me all contacts related to Acme Corp who had an email call last month.' Your agent handles the complexity of pulling that data from leads, accounts, activities, and custom fields.

It's about getting immediate answers instead of spending time navigating menus. Whether you need a global search across every record or just want to check if a lead is ready for a follow-up call, your agent pulls it all together instantly. Since Vinkius hosts this MCP, connecting the data flow is simple: you authorize access once from any compatible client and start working right away.

Core Capabilities

01 — Search across all records

Perform a single search query that checks leads, contacts, and accounts simultaneously.

02 — Get specific account details

Fetch the full profile, history, and metadata for any business account using its unique ID.

03 — Retrieve contact profiles

Pull complete details about individual people or contacts associated with a deal.

04 — Track all sales activities

Review and list past actions, including calls, meetings, and emails logged against an account.

05 — Monitor leads status

List current sales opportunities and retrieve metadata about their pipeline stage or value.

One Click on Vinkius — From Prompt to Execution

Available at vinkius.com/mcp/nutshell-crm — connect your AI agent in three steps.

- 01** Subscribe to this MCP on Vinkius and provide your Nutshell login details and API key.
- 02** Tell your AI client exactly what you need, for example: 'Find all leads that are stalled in the Demo stage.'
- 03** Your agent executes the necessary queries against Nutshell CRM and presents the structured data right back to you.

The bottom line is, your agent uses natural conversation to run complex reports and lookups inside Nutshell without needing manual clicks or API calls from you.

Built For

Sales teams who hate context switching. Account managers drowning in data silos.
Business owners who need a real-time, conversational view of their entire pipeline health.

Account Manager

You use this to instantly check an account's full history or find out which contacts were last involved in a key meeting without logging into the main CRM dashboard.

Sales Representative

You run quick searches across leads and accounts to verify status details before making a call, saving minutes on every single prospect.

Business Owner/VP of Sales

You ask the agent for aggregated reports or activity summaries needed for daily standups or executive reviews in natural language.

What Changes When You Connect

- 01** Instant Status Checks: Instead of navigating to a lead record, you can simply ask your agent for the status or details of an opportunity using the `get_lead_details` tool. You get real-time info without switching tabs.

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- 02 360-Degree Client View: Need to know everything about a client? The combination of `list_accounts`, `list_contacts`, and `get_account_details` lets your agent pull together the full picture—from past meetings to current contacts.

 - 03 Global Search Power: Don't waste time guessing where data lives. Use `universal_search` to query across every single entity, checking leads, accounts, and contacts simultaneously with one prompt.

 - 04 Audit Activity Logs: Never forget who talked to whom or when. You can use `list_activities` to pull a chronological list of calls, emails, and meetings tied to any client account.

 - 05 Custom Data Visibility: Many CRMs hide crucial details in custom fields. This MCP includes `list_custom_fields`, ensuring your agent knows exactly where to look for specific data points.
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Real-World Applications

Finding a forgotten client detail

A Sales Rep needs the primary contact's direct phone number but can't remember if it was recorded in Nutshell. They ask their agent: 'What is Michael Scott's current direct line?' The agent uses `get_contact_details` and responds instantly with the correct number, saving a manual search.

Broad investigation of a company name

A Business Owner hears about a potential competitor, 'Acme Industrial.' They ask their agent to check this group: 'Search for Acme Industrial in leads, contacts, and accounts.' The agent uses `universal_search` and provides counts from all three areas.

Assessing account health before a meeting

An Account Manager has an upcoming call. They ask: 'What were the last three activities logged for Acme Corp?' The agent uses `list_activities` and summarizes if the client is active or if follow-up is needed.

Building a pipeline report on the fly

A Sales Rep needs to know which opportunities are stuck. They prompt: 'List all leads that haven't moved in 30 days.' The agent uses `list_leads` and filters out stalled prospects for review.

Patterns to Avoid

Treating the MCP like a database query tool

✗ AVOID

A user tries to paste huge JSON dumps or complex SQL queries into the chat, expecting the agent to execute them raw. This fails because it requires structured conversation.

✓ INSTEAD

Instead of dumping code, describe your goal in plain English. Say: 'List all accounts that have had an email activity type logged last month.' The agent handles the data structure for you.

Focusing only on one record type

✗ AVOID

A user asks, 'What are my leads?' and gets a list of names, but forgets to check accounts. They miss context about the company's size.

✓ INSTEAD

Always use `universal_search` or ask for related data. Prompt: 'Tell me about Acme Corp's full relationship history.' This forces the agent to pull together account, contact, and lead data.

Overlooking available actions

✗ AVOID

A user only asks for a list of contacts but needs to know what *kind* of activities are even possible (e.g., video call vs. in-person meeting).

✓ INSTEAD

Before querying, ask the agent: 'What types of sales interactions can I log?' This uses `list_activity_types` and gives you context before you search for data.

The Right Fit

Use this MCP if your primary pain point is getting immediate answers about client relationships. You need to talk to your CRM, not navigate it. If you only need to view static reports that are already exported into a spreadsheet, this isn't necessary. But if the information lives within Nutshell—whether it's an account detail, a contact name, or a specific activity log—you use this MCP. Don't use this if you need to *create* new records (like adding a brand new lead) without specifying that action; focus on retrieval first. If your goal is pure data analysis outside the CRM context, look at general ETL tools instead.

The endless cycle of switching tabs just to check one detail

Right now, checking a client's status means opening Nutshell, finding the account, clicking into the activity feed, scrolling past old emails, then maybe jumping over to the 'Contacts' tab to verify the right person was involved. It's slow, it's click-heavy, and you lose momentum.

With this MCP connected via Vinkius, that process shrinks down to one conversation. You just type a question—like 'Who last spoke with Acme Corp about pricing?'—and your agent pulls the exact answer from all those tabs into plain text for you. It's instant context.

Nutshell CRM MCP: Direct conversational access to leads and accounts

You no longer have to run separate searches for contacts, then switch back to the account overview, and finally check the activity log. The agent handles that cross-referencing automatically.

What changes now is efficiency. You move at the speed of thought, not the speed of mouse clicks. Your AI client becomes your direct window into your most valuable data.

Nutshell CRM: 10 Tools for Sales Automation

Use these tools to retrieve specific data points across your entire Nutshell environment—from listing all contacts to finding activity types.

#	TOOL	DESCRIPTION
01	<code>list_accounts</code>	Finds and lists all business accounts within your Nutshell CRM.
02	<code>list_activities</code>	Retrieves a list of recorded customer interactions, like calls or meetings.
03	<code>list_activity_types</code>	Lists all predefined types of activities (e.g., Phone Call, Email) you can track in the CRM.
04	<code>list_contacts</code>	Finds and lists individual people or contacts associated with your accounts.
05	<code>list_leads</code>	Finds and lists all sales leads that are currently in the pipeline.
06	<code>get_account_details</code>	Retrieves specific, deep information about a single business account.
07	<code>get_contact_details</code>	Pulls all available profile and contact details for one person.
08	<code>list_custom_fields</code>	Lists the specific custom data fields configured in your Nutshell instance.
09	<code>get_lead_details</code>	Retrieves comprehensive information for a single sales lead.
10	<code>universal_search</code>	Searches across leads, contacts, and accounts all at once using one keyword query.

See It in Action

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

U List my most recent sales leads.



Retrieving leads... I found 5 recent leads including 'Enterprise Upgrade - Acme' (\$12,000), 'New Office Solution', and 'Q4 Growth'. Would you like the full details for the Acme upgrade?

U Search for any contact or lead related to 'Dunder Mifflin'.



Executing universal search... I've found 1 Account ('Dunder Mifflin Paper Co. '), 2 Contacts ('Michael Scott', 'Dwight Schrute'), and 1 active Lead. Which record would you like to inspect?

U What are my upcoming activities and meetings?



Retrieving activities... You have 3 scheduled items: 'Follow-up Call' with John Smith at 2:00 PM, 'Project Kickoff' tomorrow at 10:00 AM, and a 'Dinner Meeting'. Shall I retrieve the contact info for John Smith?

Frequently Asked Questions

01 How does Nutshell CRM MCP handle multiple types of records?

It uses its universal search capability to query leads, contacts, and accounts simultaneously. This means you can ask one question and get results across all three record types.

02 Can I use the `list_activities` tool for forecasting sales?

The `list_activities` tool retrieves historical data of calls or meetings. You must analyze this data yourself; the MCP just provides the raw, accurate activity logs for you to review.

03 What is the difference between `list_contacts` and `get_contact_details`?

`list_contacts` shows a roster of people (a list view), while get_contact_details` pulls all available information about one specific person, giving you the deep dive profile.`

04 Does Nutshell CRM MCP work with my existing data structure?

Yes. The listing includes a tool to list custom fields (`list_custom_fields``). This ensures your agent knows exactly which unique data points exist in your specific Nutshell setup.

05 Is this better than manually searching the Nutshell interface?







It's faster and less error-prone. You get a single, summarized answer from the chat window instead of jumping between multiple dedicated tabs within the CRM UI.

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>"nutshell-crm": { "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

Nutshell 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](https://cloud.vinkius.com) →

vinkius.com · support@vinkius.com

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