

MCP SERVER

NO CODE

CLOUD HOSTED

PandaDoc MCP

Orchestrate Contracts & Signatures Conversationally

PandaDoc helps you manage contracts, proposals, and e-signatures directly within your chat client. Instead of logging into a separate portal, use this MCP to orchestrate document workflows naturally. You can track signature statuses, create new documents from templates, send agreements to multiple people, or retrieve final PDFs—all by talking to your AI agent. It's full control over your entire sales closing process.

A+ Quality Score 100/100

pandadoc

e-signature

document-automation

contracts-api

proposal-tracking

template-orchestration



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.

PandaDoc MCP

11 tools available

Cloud-hosted on Vinkius

Managing contracts used to mean jumping between five different tabs: the template library, the document status dashboard, the recipient list, and the signature tracker. Now you can handle all that conversationally. This MCP lets your AI client take over the whole document lifecycle. You tell it what needs doing—like 'Send the Q3 renewal proposal'—and it handles the backend steps automatically. It doesn't just check a status; it monitors if John signed and pulls up the final PDF when he does. Through Vinkius, you connect your preferred AI client once, and this MCP acts like an always-on sales operations assistant for document management. You get to build complex workflows—from creating a new proposal using `create_document` to managing signatures with `send_document`—without ever writing code or leaving the chat window.

Core Capabilities

01 — Track Agreement Status

Check the current status and detailed progress of any managed document.

02 — Generate New Contracts

Create a new, personalized contract or proposal from an existing template.

03 — Send Documents for Signing

Distribute contracts to multiple recipients and initiate the real-time signing session.

04 — Manage Templates

View, retrieve metadata, and monitor your organization's full library of document templates.

05 — Organize Files

List the different folders where your company stores its managed documents.

One Click on Vinkius — From Prompt to Execution

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

- 01 Subscribe to this MCP and enter your PandaDoc API Key in the Vinkius connection settings.
- 02 Tell your AI agent what you need—for example, 'List all documents needing signatures.'
- 03 The agent executes the necessary steps through the available tools and provides you with a natural language summary of the results.

The bottom line is that your AI client acts as a dedicated workflow coordinator for everything related to contracts and proposals.

Built For

Sales reps who are tired of logging into PandaDoc just to check if the signature came through. Legal teams needing instant visibility into contract status, or Ops managers who need to automate the entire document issuance process from a single chat window.

Account Executive

Sending out follow-up proposals and checking if key clients have signed last week's agreement without opening any browser tabs.

HR Manager

Automatically generating onboarding documents for new hires using templates and monitoring the signature progress of employee agreements in real time.

Sales Operations Analyst

Running bulk checks on document metadata across multiple folders to ensure all compliance fields are filled out before a contract is sent.

What Changes When You Connect

- 01 Stop switching between apps. You can send a proposal and track its status, all from your chat client, eliminating the need to navigate separate dashboards.

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- 02 Get full document visibility using `list_documents`; you can search for agreements by keyword or filter them specifically by 'draft' or 'sent' status in one command.

 - 03 Never start from scratch. Use `list_templates` and then `create_document` to build a personalized, professional contract instantly using existing company frameworks.

 - 04 Streamline onboarding processes with the agent's ability to `send_document`; you can distribute agreements to multiple new hires simultaneously with custom messages.

 - 05 When the deal closes, use `get_download_link`. You pull the final PDF directly into your chat for filing or sending to the client—no manual download required.
-

Real-World Applications

Checking Deal Status

An AE needs to know if a contract signed last week is ready. Instead of logging in, they ask their agent to `list_documents` and filter by 'sent'. The agent immediately replies with the status for every file, telling them exactly who still needs to act.

Template Audit

The Ops team needs to know which templates are active and who owns them. They ask their agent to `list_templates`, getting back the full template IDs required to perform any document creation or retrieval.

Batch Onboarding

An HR manager has 12 new hires starting on Monday. They ask their agent to use `list_templates` to find the correct onboarding package and then `send_document` it out, adding a personalized welcome message for each person.

Patterns to Avoid

Manual Status Checking

X AVOID

A user manually clicks into PandaDoc's dashboard, filters by date, then clicks on each document one by one just to see if it's signed.

✓ INSTEAD

Use `list_documents`; ask your agent to search the documents and provide a summary of statuses. This is faster and gives you an immediate overview without any clicking.

Template Hunting

X AVOID

A user spends 10 minutes browsing PandaDoc's template library trying to find the right version of an NDA.

✓ INSTEAD

Start by running `list_templates`. This gives you a clean, immediate list with IDs, letting your agent `create_document` using the correct template ID right away.

The Right Fit

Use this MCP if your biggest pain point is moving between different interfaces (PandaDoc dashboard, email client, CRM) just to manage document status. If you need conversational control over the full lifecycle—creating, sending, and tracking signatures—this is for you. Don't use it if all you need is a simple, one-time data dump of contacts; in that case, `list_contacts` works fine on its own. But if your goal involves *workflow* (e.g., 'Find the template, create the document, and send it'), this MCP provides the full orchestration layer.

The endless cycle of status checking is exhausting.

Today, closing a deal feels like juggling multiple apps. You draft a contract in one place, send it via email from another, and then spend the next hour bouncing between PandaDoc's dashboard tabs—

With this MCP, your AI agent handles that entire mess. You simply ask: 'What documents are overdue for signatures?' Your agent goes into the background, checks all statuses using `get_document_details` and `list_documents`, and

Status, Recipients, Metadata—just to figure out if Jane signed or if you need to resend the link.

spits back a plain-English answer, telling you exactly who needs to act.

PandaDoc MCP lets you build contracts without leaving your chat.

The manual steps that vanish are the need to switch accounts or write multi-step automation flows. You don't have to remember which template ID is right, nor do you have to manually trigger the sending process. The agent manages it all for you.

It's not just tracking; it's full control. From listing your templates with `list_templates` to finally getting a final PDF using `get_download_link`, everything happens in one conversation.

PandaDoc MCP: 11 Tools for Document Operations

These tools allow you to manage the complete lifecycle of documents, from listing templates and creating new drafts to sending agreements and tracking final signatures.

#	TOOL	DESCRIPTION
01	<code>create_document</code>	Initiates the creation of a new PandaDoc file using specified templates and recipient lists.
02	<code>create_signing_session</code>	Sets up an embedded session that allows recipients to sign documents in real time.
03	<code>delete_document</code>	Permanently removes a specified PandaDoc document from the account.
04	<code>get_download_link</code>	Retrieves the direct link needed to download a final, completed version of a document.
05	<code>get_document_details</code>	Pulls detailed information on an individual document, useful for tracking specific signature progress.
06	<code>get_template_details</code>	Retrieves full metadata and usage details for a single document template.
07	<code>list_contacts</code>	Lists all contact information stored within the PandaDoc account.
08	<code>list_documents</code>	Searches and lists multiple documents, allowing filtering by status or keyword query.
09	<code>list_folders</code>	Displays the organizational structure of document folders within your account.
10	<code>list_templates</code>	Gets a list of all available templates, providing the IDs needed for creating new documents.
11	<code>send_document</code>	Sends an existing document to selected recipients and optionally includes a custom message in the notification email.

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 PandaDoc documents and their statuses.



I've retrieved your documents. You have 15 active files including 'Acme Contract' (Status: draft) and 'Renewal Proposal' (Status: sent). Would you like to check the recipient for any of them?

U Send the contract document doc_3847 to the client for electronic signature.



Document doc_3847 "Service Agreement 2025" has been sent for signature. Recipients: John Martinez (CEO) at john@acmecorp.com and Lisa Park (Legal) at lisa@acmecorp.com. Both received email notifications with unique signing links. The document status has changed from Draft to Sent. Average completion time for similar documents is 2.3 days.

U List all available document templates I can use to create new proposals.



You have 12 templates available. Top 5 by usage: "Standard SaaS Agreement" (used 34 times), "Consulting Proposal" (28 uses), "NDA Mutual" (22 uses), "Statement of Work" (18 uses), and "Sales Quote" (15 uses). 3 templates were updated in the last 30 days. All templates support dynamic field merging with recipient and company data.

Frequently Asked Questions

01 How do I send an agreement using PandaDoc MCP?

You use the send_document tool. Just tell your agent which document you want to send and who should receive it; the agent handles the distribution and notification.

02 Can I list all my contracts with PandaDoc MCP?

Yes, you can run `list_documents` to search across multiple agreements. You can filter by status or keyword to narrow down exactly what you need to see.

03 What is the best way to create a new contract with PandaDoc MCP?

First, use `list_templates` to find the correct template ID. Then, tell your agent to `create_document` using that ID and specifying the recipients.

04 Does PandaDoc MCP help me track signatures in real time?







Yes, by getting document details, you can monitor signature statuses programmatically. The agent alerts you when a status changes or if a deadline is near.

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>"pandadoc-alternative": { "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

PandaDoc 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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