MCP SERVER | NO CODE | CLOUD HOSTED

Salesforce Analytics & SOQL MCP

Query Accounts, Contacts, and Opportunities with Code-Grade Precision.

Salesforce Analytics & SOQL gives your AI client direct access to the raw data in your Salesforce environment. It lets you run complex queries (SOQL) against any object, check record counts across accounts or leads, and pull full datasets from saved reports and dashboards using natural language conversation.

A+ Quality Score 100/100

soql-query | crm-reporting | data-visualization | sales-performance | dashboard-analytics | data-querying

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vinkius.com/mcp/salesforce-analytics-soql

SCAN TO VIEW

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.

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.

Salesforce Analytics & SOQL MCP

6 tools available
Cloud-hosted on Vinkius

Need sales numbers but don't want to jump through three different menus? This MCP connects your AI client directly into the data layer of your Salesforce org. Instead of clicking around to find a dashboard component or running multiple separate queries, you just ask the question—like, "What was our win rate last quarter by industry?"

Your agent handles the complexity. It runs the necessary queries against standard and custom objects, pulling back structured data whether you need an aggregate total, a detailed report list, or a simple record count. You can also discover available visualizations using tools like sf_list_dashboards before having your agent pull all component metrics with sf_get_dashboard. If you're managing sales operations, this access means instant answers without waiting for the BI team to build a dashboard. Connecting through Vinkius ensures that whether you use Claude or Cursor, you get one single entry point to everything in your CRM data.

Core Capabilities

01 — Calculate record volume

Quickly determine how many records exist for any object type, such as accounts, contacts, or leads.

02 — Build custom data reports

Execute raw SOQL queries to pull specific combinations of fields and objects that aren't available in standard reports.

03 — Extract dashboard metrics

Pull the underlying component data—charts, tables, and metrics—from a specified Salesforce dashboard ID.

04 — List reporting assets

Retrieve a list of all existing reports in your organization, including their format and last run date.

05 — Run specific saved reports

Execute established Salesforce reports to get full datasets, returning up to 2000 rows for deep analysis.

One Click on Vinkius — From Prompt to Execution

Available at **vinkius.com/mcp/salesforce-analytics-soql** — connect your AI agent in three steps.

01 Ask your AI client a data question (e.g., "Show me all open opportunities over $50k").

02 The MCP translates that request into the correct Salesforce query, whether it’s running raw SOQL or executing an existing report.

03 Your agent receives structured results—a clean table of data points—which you can then use in your workflow.

The bottom line is: you get immediate access to precise CRM data without leaving the conversation with your AI client.

Built For

This MCP is essential for anyone who needs business intelligence but can't wait for a formal report. It serves analysts, sales ops teams, and executives who need instant answers to complex questions using raw CRM data.

Sales Operations Manager

Uses this MCP to check record counts (sf_record_count) or run reports (sf_list_reports) to track capacity and ensure reporting consistency across the team.

Business Analyst

Writes complex, ad-hoc queries using raw SOQL (sf_run_soql) to test hypotheses on data relationships that aren't covered by standard dashboard views.

Sales Executive

Quickly checks the status of a key metric or pipeline total with conversational prompts, accessing visualized summaries via sf_get_dashboard.

What Changes When You Connect

01 Get immediate data volume checks. Instead of guessing how many leads you have, use sf_record_count to get an exact, current total for any object in seconds.

02 Bypass standard reporting limits. With raw SOQL access (sf_run_soql), you write the exact query needed—combining objects and applying filters that no pre-built report can handle.

03 Understand your existing metrics better. Use sf_list_dashboards first, then sf_get_dashboard to pull all component data from a specific visualization for detailed analysis.

04 Never wait for a rerun. When you need fresh numbers, use sf_run_report after finding the report ID with sf_list_reports. It's like clicking 'Run Report' instantly.

05 Simplify discovery. Need to know what reports exist? sf_list_reports gives you the full manifest of available reporting assets in one clean list.

Real-World Applications

Determining quarterly revenue trends

The CFO needs to compare 'Closed Won' deals across four different product lines but no single dashboard shows that breakdown. They ask the agent, and it runs a custom query using sf_run_soql to group and sum the amounts exactly as requested.

Auditing data completeness

The team lead needs to know if any accounts have zero associated contacts. They use sf_record_count to check the number of accounts, then run a specific query using sf_run_soql to find unmatched IDs.

Reviewing old campaign performance

A marketer wants to see how leads from a specific 2023 campaign performed. They first use sf_list_reports to find the historical report ID, then execute it with sf_run_report to extract all raw data points.

Quickly checking object health

A manager needs an immediate count of open cases across three regional teams. They don't want a full dashboard; they just ask the agent, and it runs sf_record_count for each specified custom object.

Patterns to Avoid

Asking the AI to 'just know'

✗ AVOID

Prompting: "Tell me why our Q2 win rate dropped." The agent responds vaguely, citing general data trends but offering no actionable numbers.

✓ INSTEAD

Don't ask for vague insights. Instead, use sf_run_soql to execute a focused query like SELECT... WHERE StageName = 'Closed Lost' AND CloseDate = THIS_QUARTER LIMIT 10. This forces the agent to retrieve specific, measurable data.

Relying on single dashboards

✗ AVOID

Assuming that because a dashboard exists for 'Pipeline,' it contains every necessary metric like historical conversion rates or average deal size.

✓ INSTEAD

Don't trust the visual summary. Use sf_list_dashboards to find the ID, then use sf_get_dashboard to pull *all* underlying component data and inspect the source reports before making a decision.

Forgetting which report is current

✗ AVOID

Running an outdated report that was saved last month but contains old criteria, leading to incorrect analysis.

✓ INSTEAD

Always start by using sf_list_reports. Check the 'Last Run Date' field to ensure you are querying a reporting asset that has been refreshed recently.

The Right Fit

Use this MCP if your core problem is data accessibility and structure. Specifically, use it when your question requires joining multiple Salesforce objects (like Accounts with Opportunities) or calculating metrics that require raw code like `SELECT SUM(Amount)...`. If you just need to know the number of records in one object, sf_record_count works fine. Don't use this if you are trying to build a multi-step workflow *outside* of data retrieval—for that, look at specialized automation or integration tools. Never use this MCP for viewing documents; it only handles structured CRM data.

The Pain Point: Navigating Salesforce by Menu

Today, getting a complete picture of sales performance means logging into the platform and clicking through tabs. You might run a report for 'Pipeline,' then have to copy an ID, go find the associated dashboard, click on the chart component data, and finally check a separate list view just to count records. It's a frustrating loop of context switching and manual copying.

With this MCP, you ask your agent what you need in plain English. The tool handles the entire sequence—listing reports, identifying dashboards, running SOQL queries, and pulling component data—and delivers one clean answer. You get the insight instantly; no more tedious clicks.

Getting Precise Insights with Salesforce Analytics & SOQL

The specific manual steps that disappear include locating the correct report ID, navigating to the dashboard component structure, and running ad-hoc queries just to validate a single number. These tasks used to take minutes of clicking and pasting.

Now, you treat your entire CRM dataset like a conversation partner. You speak your business question, and the MCP executes the necessary backend code (like sf_run_soql) to give you the precise answer, every time.

Salesforce Analytics & SOQL: 6 Available Tools

These tools give your agent the specific functions it needs to query records, run reports, list available assets, and retrieve complex dashboard metrics from Salesforce.

#	TOOL	DESCRIPTION
01	`sf_get_dashboard`	Retrieves all component data—charts, metrics, and tables—from a specific Salesforce dashboard ID.
02	`sf_record_count`	Returns the total number of records for any specified Salesforce object type like Account or Contact.
03	`sf_list_dashboards`	Lists all available Salesforce dashboards, providing their title and ID so you know what visualizations exist.
04	`sf_list_reports`	Provides a list of existing reports, showing their name, folder path, format, and last run date.
05	`sf_run_report`	Executes a specific saved report by ID, returning its full dataset with all rows and columns for deep review.
06	`sf_run_soql`	Runs any custom query against standard or custom objects, allowing you to select fields and apply filters across the entire CRM dataset.

See It in Action

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

U What was our total revenue closed this quarter?

💰 SELECT SUM(Amount) FROM Opportunity WHERE StageName = 'Closed Won' AND CloseDate = THIS_QUARTER

$2,340,000 closed this quarter across 47 deals

U Show me all reports in the Sales folder

📊 Found 8 reports in Sales:
1. Pipeline by Stage
2. Won Deals MTD
3. Lead Conversion Rate
...

U How many accounts do we have by industry?

🏢 SELECT Industry, COUNT(Id) FROM Account GROUP BY Industry

INDUSTRY	COUNT
Technology	234
Financial Services	189
Healthcare	156

Frequently Asked Questions

01 **How does sf_run_soql work with multiple objects?**

sf_run_soql allows you to join related standard or custom objects (e.g., Account and Opportunity) in a single query, letting you select fields from both sources at once.

02 **Is sf_get_dashboard the same as running a report?**

No. A report (sf_run_report) provides raw data rows. sf_get_dashboard pulls specific metrics and component data that are already designed for visualization on a dashboard.

03 **What if I don’t know the name of my custom object?**

You can use general prompts, but providing the API name helps. The MCP supports running queries against both standard and custom objects as long as you provide the correct object type.

04 **Do I need to run sf_list_reports before using sf_run_report?**

It's best practice. Use sf_list_reports first to confirm the exact report name and ID, which you then pass to sf_run_report for accurate execution.

05 **Can I just ask for a count without using sf_record_count?**

You can. However, sf_record_count is the dedicated tool designed specifically and reliably to return the total number of records for any object type quickly.

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 `"salesforce-analytics-soql": { "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

Salesforce Analytics & SOQL 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

INDEPENDENT PLATFORM DISCLAIMER

DOCUMENT INFORMATION

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Platform	Vinkius Cloud for AI Agents
Endpoint	`https://edge.vinkius.com/{token}/mcp`

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