

MCP SERVER

NO CODE

CLOUD HOSTED

Salesforce Files & Notes MCP

Access every document and conversation history in one chat.

Salesforce Files & Notes MCP connects your natural language agent directly to all files, attachments, and notes across any Salesforce record. Search for proposals, track version history on contracts, or write a follow-up note—all without leaving your conversation window.

A+ Quality Score 100/100

file-storage

document-management

crm-attachments

note-taking

version-control

record-linking



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.

Salesforce Files & Notes MCP

7 tools available

Cloud-hosted on Vinkius

Dealing with complex records in Salesforce means jumping between tabs: checking the file tab for documents, clicking into related lists for notes, and sometimes navigating through old attachments just to find one piece of data. This MCP changes that. It lets you talk to your AI client and pull out specific information from any document or note linked to a record. You can ask it to list all files associated with an account, check the version history on a key contract, or even create a new follow-up note right away.

It's designed for anyone who spends time in Salesforce but hates context switching. Instead of searching through multiple menus and lists, your agent finds what you need instantly, whether it's finding proposals or reviewing case attachments. This whole library of capabilities is managed through Vinkius, allowing any MCP-compatible client to access deep record data using simple conversation.

It's about getting the facts fast: listing recent files by their size and owner, gathering legacy attachments that are buried, or quickly searching notes based on a title.

Core Capabilities

01 — Find and list recent documents

Get a list of the most recently modified files, including file type, size, and who owns them.

03 — Retrieve old record attachments

Access and retrieve legacy or standard attachments that are linked directly to a specific record.

02 — Review document history

View the complete version history for any specific file to see how it has changed over time.

04 — Locate all related files

Find every document that has been explicitly linked to the current record, regardless of how many records it touches.

05 — Create new records notes

Write and attach a brand-new note directly to an existing Salesforce record using natural language prompts.

06 — Search internal notes by topic

Search across all attached notes, filtering results based on keywords found in the title or body preview.

One Click on Vinkius — From Prompt to Execution

Available at vinkius.com/mcp/salesforce-files-notes — connect your AI agent in three steps.

- 01** You tell your AI client exactly what you need—for example, 'Show me the latest contract versions for Acme Corp's account.'
- 02** The MCP routes that request to Salesforce, executing multiple checks against linked files, attached records, and notes.
- 03** Your agent returns a consolidated list or document summary directly in the chat window, eliminating all manual data gathering.

The bottom line is you get Salesforce's entire record history—files, attachments, and notes—delivered conversationally without opening a single tab.

Built For

Sales reps who dread the pre-call prep work. Support specialists drowning in case histories. Operations teams that manage document compliance. If your job requires you to know what was said or signed on Record X, this is for you.

Account Executive

Needs to pull together a file summary of proposals and contracts linked to an account before a client meeting.

Customer Support Specialist

Must access attachments from old cases or review the full version history of a troubleshooting guide for a customer.

Sales Operations Manager

Needs to audit document ownership and track which files have been updated over time across multiple department records.

What Changes When You Connect

- 01** Stop clicking through tabs. Instead of manually checking the file, attachments, and notes sections on a record page, you simply ask your agent to 'Show me everything related to this client.'

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- 02** You can track changes immediately. Use `sf_file_details` to view the version history of any document, so you know exactly who changed what and when, without digging through complex menus.

 - 03** Never miss an old piece of info again. The agent handles legacy attachments retrieval (`sf_get_attachments`) for records where those files might be buried deep in the system.

 - 04** Drafting follow-ups is faster than ever. Use `sf_create_note` to write and attach a new note instantly, logging activity on a record without opening the notes section first.

 - 05** Find documents by context. Instead of knowing the exact file name, use `sf_search_files` or `sf_search_notes` to locate content based on keywords across titles or descriptions.
-

Real-World Applications

Preparing for a client review

A sales rep needs to summarize the history of an account. They ask their agent, 'What proposals and contracts are linked to Acme Corp?' The agent uses `sf_linked_files` and `sf_search_files` to pull up all relevant documents, showing name, type, size, and modification date instantly.

Documenting post-meeting actions

An Account Executive finishes a meeting. Instead of manually navigating to the record, they prompt their agent: 'Add a note saying I'll follow up next week about renewal.' The agent uses `sf_create_note` to log the action directly.

Troubleshooting a support case

A support specialist is on a call with a user. They ask their agent, 'What was the last version of the setup guide for this account?' The agent executes `sf_file_details` to pull up the full audit trail and provide the correct document link immediately.

Auditing historical records

An operations manager needs to know who was responsible for an old contract. They ask their agent, 'Show me all files linked to this project that were modified before Q1.' The agent uses `sf_linked_files` and filters the results by date.

Patterns to Avoid

Manually searching for old documents

X AVOID

Spending 20 minutes clicking through a record's Related Lists, then switching to the Files tab, then scrolling down to find the correct attachment.

✓ INSTEAD

Just ask your agent. Prompting with 'Find all attachments and notes on this record' uses `sf_get_attachments` and gathers everything into one conversational summary.

Forgetting version control details

X AVOID

Assuming the current document is the final, signed version when the file history shows three drafts over the last month.

✓ INSTEAD

Always run a check for `sf_file_details`. This tool pulls up the full version timeline, confirming which draft or release was actually used.

Losing track of related files

X AVOID

Working on one record and forgetting that three other documents were also attached but listed in a different tab.

✓ INSTEAD

Use `sf_linked_files`. It gives you a comprehensive, single list of every document tied to the main record ID.

The Right Fit

Use this MCP if your workflow requires synthesizing information from multiple data silos within Salesforce—specifically files, notes, and attachments—into a single, coherent answer. You need an agent that acts like you have eyes everywhere on the screen at once.

Don't use this if you only need to read a static report or perform simple data entry tasks. If your goal is simply to create a record in another system (like sending an email), look for dedicated messaging MCPs. This tool shines when it needs to answer: 'What happened here, based on *everything*?'

The pain of Salesforce context switching.

Today, finding a complete picture of an account is painful. You start by checking the main record page for recent files, but then you have to navigate away to check related attachments in a separate list. Next, you might need to jump to the Notes section just to see if a conversation happened last week. It's a constant cycle of clicking tabs and cross-referencing data points.

With this MCP, your agent does all that work for you. You ask one question—like 'What did we agree on regarding pricing?'—and it pulls the answer from notes (sf_search_notes), checks if there's a related proposal file (sf_linked_files), and tells you where to find it. It's instant data synthesis.

Get all files, attachments, and notes with Salesforce Files & Notes MCP.

The biggest time sink goes away: the manual search for document history. You no longer need to remember whether the information you want is in an attachment, a note, or a linked file. The agent checks all three places automatically.

It's about knowing the entire story at a glance. You get immediate access to version control (sf_file_details) and the full context of past conversations right where you're working.

Salesforce Files & Notes: 7 Tools Available

These tools give your AI client direct access to critical Salesforce data points—from version histories on documents to new notes attached to records.

#	TOOL	DESCRIPTION
01	<code>sf_create_note</code>	Writes a new note and attaches it directly to the specified record in Salesforce.
02	<code>sf_get_attachments</code>	Retrieves standard attachments linked to a specific Salesforce record for review.
03	<code>sf_file_details</code>	Gets the complete version history and metadata for a particular file document.
04	<code>sf_linked_files</code>	Finds and lists every single document that has been manually linked to a given record ID.
05	<code>sf_recent_files</code>	Lists the most recently modified files across your entire Salesforce instance.
06	<code>sf_search_files</code>	Searches all content versions in Salesforce by title, returning metadata like size and owner.
07	<code>sf_search_notes</code>	Searches existing notes within Salesforce using keywords from the note's title or body preview.

See It in Action

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

U Find all files related to the Acme account



Files linked to Acme Corp

NAME	TYPE	SIZE	DATE
Proposal_Q1.pdf	PDF	2.3MB	Mar 15
Contract_v2.docx	WORD	450KB	Mar 22
NDA_signed.pdf	PDF	1.1MB	Jan 10

U Search for files named proposal



Found 5 files matching "proposal":

1. Proposal_Q1_2024.pdf (2.3MB)
2. Sales_Proposal_Template.docx (800KB)
3. Proposal_v3_final.pdf (1.5MB)

U Create a note on the Acme account: Follow up next week about renewal



Note Created!

- Title: Follow up next week about renewal
- Parent: Acme Corp
- Created: Just now

Frequently Asked Questions

01 Can Salesforce Files & Notes MCP find files by owner?

Yes, the agent can search for files using metadata like ownership. You can ask to list recent files and specify filtering criteria such as who owns them or what their size is.

02 What if I need to create a note on an old record?

You use `sf_create_note`. Just give your agent the content you want in the note and specify which record it should be attached to, and it handles the creation.

03 Does Salesforce Files & Notes MCP work with attachments from old cases?

Yes. The `sf_get_attachments` tool allows your agent to retrieve legacy attachments on a specific record, even if they are buried deep in case history tabs.

04 Can I search notes using Salesforce Files & Notes MCP?

You can use the `sf_search_notes` function. You just need to provide keywords or themes, and the agent will return a list of relevant notes found across the account history.

05 Is this better than searching directly in Salesforce?







Yes. While native search is good for finding records by ID, this MCP lets your agent combine multiple data types (files, notes, attachments) and summarize them conversationally—it's synthesis, not just retrieval.

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>"salesforce-files-notes": { "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

Salesforce Files & Notes 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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