

M C P S E R V E R

N O C O D E

C L O U D H O S T E D

Salesforce MCP for AI Agents

Manage your CRM records and sales pipeline through natural conversation.

Salesforce MCP for AI agents. Connect your CRM to your AI agent to query records with SOQL, manage accounts and leads, run reports, and perform full CRUD operations. It turns your sales pipeline into a conversational workspace where you can find and update data without leaving your current app.

A+ Quality Score 100/100

soql-queries

account-management

lead-management

opportunity-tracking

crud-operations

crm-data



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 MCP

12 tools available

Cloud-hosted on Vinkius

This MCP lets you treat your CRM like a conversational database. Instead of clicking through endless tabs to find a specific lead or updating a deal stage, you just tell your agent what needs to happen. It handles the heavy lifting of navigating your sales pipeline, whether you're looking for a specific contact's history or need to pull a list of high-value opportunities. You pull data using custom queries, which means you get exactly the results you need without the noise. It's designed for people who live in their CRM but hate the manual friction of keeping it updated. By connecting this to your workflow through the Vinkius catalog, you turn your CRM into an active participant in your daily tasks rather than just another place where data goes to sit. It creates new records, updates existing ones, and runs complex reports to show how the business is actually performing. It's about getting answers and making changes in one go.

Core Capabilities

01 — Query records with SOQL

Get specific data sets using custom filters.

02 — Manage accounts and contacts

Create and update core CRM records.

03 — Track sales opportunities

Monitor deal stages and pipeline values.

04 — Execute Salesforce reports

Run and view pre-configured reports.

05 — Perform global searches

Find data across all objects at once.

06 — Handle full CRUD operations

Create, read, update, and delete any SObject.

One Click on Vinkius — From Prompt to Execution

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

- 01 Connect your Salesforce instance to the MCP via your preferred AI client.
- 02 Authorize the specific objects your agent needs to access.
- 03 Ask your agent to perform tasks like creating a lead or running a report.

The bottom line is you get to stop clicking and start talking to your data.

Built For

This is for the sales ops lead who is tired of manual data entry and the account executive who needs to find client info in seconds without switching tabs.

Sales Ops Manager

They use this to run reports and perform bulk updates to keep the sales pipeline clean.

Account Executive

They use this to quickly look up client history and update deal stages during calls.

Business Analyst

They use this to pull specific data sets using custom queries for weekly reporting.

CRM Administrator

They use this to check object metadata and manage records across the entire org.

What Changes When You Connect

- 01 Stop manual data entry by using `create_record` to add leads and accounts via voice or text. This removes the friction of opening multiple forms and clicking through various fields to get a new prospect into the system.

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- 02** Get instant answers on pipeline health by using `run_report` to pull real-time stats. You can see your win rates and revenue goals without waiting for a manual export or a scheduled email.
-
- 03** Find any client detail in seconds using `global_search` instead of clicking through multiple tabs. It scans your entire CRM to pull up the right account or contact instantly.
-
- 04** Query complex data sets quickly with `soql_query` to get precise information on demand. You can filter by industry, deal size, or date without building a new report every time.
-
- 05** Keep your data clean by using `update_record` to batch-fix deal stages or contact info. It lets you keep your CRM accurate without the tedious task of individual record editing.
-

Real-World Applications

Finding a specific lead's history

An AE asks for the history of a specific client. The agent uses `'global_search'` to find the account and `'get_record'` to show the latest notes.

Pulling weekly revenue stats

An analyst asks for the latest sales numbers. The agent uses `'list_reports'` to find the correct report and `'run_report'` to display the results.

Creating a new sales opportunity

A manager tells the agent to open a new deal for a client. The agent uses `'create_record'` to build the opportunity with all the correct fields.

Updating deal stages in bulk

A sales lead is closed. The agent uses `'update_record'` to change the status for the specific deal without the user needing to open the record page.

Patterns to Avoid

Guessing record IDs

✗ AVOID

Asking the agent to update a record without providing the ID.

✓ INSTEAD

Ask the agent to use ``global_search`` first to find the correct record ID, then provide that ID for the ``update_record`` tool.

Creating duplicate leads

✗ AVOID

Creating a new lead for a client that already exists in the system.

✓ INSTEAD

Tell your agent to perform a ``global_search`` before calling ``create_record`` to ensure the contact is not already in your CRM.

Hardcoding complex queries

✗ AVOID

Trying to write a manual query for the agent to follow every time.

✓ INSTEAD

Describe the data you need in plain English and let the agent generate the correct ``sql_query`` for you.

The Right Fit

Use this if you need a way to turn your Salesforce data into actionable info via an AI agent. It is best for teams that want to talk to their CRM and perform actions like creating leads or updating deals on the fly. Don't use it if you only need a simple one-way export; a standard CSV export tool is better for that. Use this when you need to perform actions like updating a record or creating a lead in real time. If you only need to view a dashboard once a month, you might not need this level of integration.

Salesforce CRM AI Integration: Stop the Manual Data Entry Grind

Sales teams spend hours every week jumping between tabs, copy-pasting contact info, and manually updating deal stages. It's a tedious cycle of data entry that pulls focus away from actual selling. You're constantly hunting for a specific account or trying to remember if a lead was already contacted.

This MCP changes that by making your CRM conversational. Instead of navigating menus, you just tell your agent what to do. It pulls the data, updates the records, and runs the reports for you in one go. You get your time back to focus on closing deals.

Salesforce CRM Data Management: Get Real-Time Pipeline Visibility

Stop waiting for end-of-week reports that are already outdated by the time they hit your inbox. You can now pull real-time stats on your win rates, revenue goals, and pipeline health with a single prompt.

This means you have a clear view of your business at any moment. You move from reactive reporting to proactive management because your data is always accessible and actionable.

Salesforce 12-Tool CRM Data Integration

Query records, manage accounts, and run reports with your CRM using these tools.

#	TOOL	DESCRIPTION
01	<code>list_contacts</code>	View a list of all contacts in your Salesforce instance. This helps you quickly see who your current leads are.
02	<code>list_opportunities</code>	See all current sales opportunities in your pipeline. It provides a quick overview of your active deals.
03	<code>get_record</code>	Fetch a specific record by its ID and SObject type. Use this to pull details for a single account or lead.
04	<code>soql_query</code>	Run custom SOQL queries to pull filtered data from any object. This is the best way to get very specific data sets.
05	<code>describe_object</code>	Pull metadata to understand the structure of a specific Salesforce object. It helps the agent know what fields are available.
06	<code>list_reports</code>	See a list of all available reports in your Salesforce org. Use this to find the ID of a report you want to run.
07	<code>run_report</code>	Execute a specific report by its ID to get the latest results. This lets you see your latest sales numbers instantly.
08	<code>global_search</code>	Search across all objects like Accounts and Leads at the same time. It is the fastest way to find a specific piece of information.
09	<code>list_accounts</code>	View a list of all accounts in your CRM. This provides a high-level look at your client base.
10	<code>create_record</code>	Add a new record to Salesforce using a JSON string of fields. You can use this to create new leads or accounts.
11	<code>update_record</code>	Modify an existing record by providing its ID and the new fields. This is how you update deal stages or contact info.
12	<code>delete_record</code>	Remove a record from your Salesforce instance permanently. Use this with caution to clean up old or incorrect data.

See It in Action

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

U Show me all open opportunities worth over \$50,000.



Found 7 open opportunities over \$50,000:

1. **Acme Corp - Enterprise License** — \$120,000 (Stage: Negotiation)
2. **TechStart - Platform Migration** — \$85,000 (Stage: Proposal)
3. **GlobalRetail - API Integration** — \$67,500 (Stage: Discovery)

...

Total pipeline value: \$487,500

U Create a new lead for John Smith from TechCo, email john@techco.com.



✓ Lead created successfully!

- **Name:** John Smith
- **Company:** TechCo
- **Email:** john@techco.com
- **ID:** 00Q8Z00001kL2mN
- **Status:** Open - Not Contacted

Run the Monthly Sales Report.



Monthly Sales Report (March 2026):

METRIC	VALUE
Total Revenue	\$2.4M
Deals Closed	34
Avg Deal Size	\$70,588
Win Rate	28%
Pipeline Growth	+15%

Top performer: Sarah Chen (\$485K closed)

Frequently Asked Questions

01 Can the Salesforce MCP create new leads?

Yes, it can create new records like Leads and Accounts directly. You just need to provide the details in plain English.

02 Does it support custom objects in Salesforce?

Yes, it supports full CRUD operations on SObject types, meaning it can work with your custom business objects.

03 Can I run my existing Salesforce reports?

Yes, you can list and run reports by their IDs. The agent can pull the latest results and show them to you instantly.

04 Is my Salesforce data safe with this MCP?

The MCP operates using your existing Salesforce permissions. It only accesses the data your user account is authorized to see.

05 How do I find a specific record if I don't have the ID?

You can use the global search tool. It scans your entire CRM to find the right account, contact, or lead for you.

06 Can it update existing deals or records?

Yes, it can update any record by providing its ID and the new information. This is perfect for changing deal stages or contact details.

07 Can I run custom SOQL queries?

Yes! The ``soql_query`` tool accepts any valid SOQL string. Example: `SELECT Id, Name, Amount FROM Opportunity WHERE StageName = 'Closed Won' LIMIT 20.`

08 Can I create records in any object?

Yes! Use ``create_record`` with the SObject type (Account, Contact, Lead, etc.) and a JSON string of fields.

09 How do I search across all Salesforce data?

Use ``global_search`` with your search text. It uses SOSL to find matches across Accounts, Contacts, Leads, and all other objects simultaneously.

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": { "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 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

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DOCUMENT INFORMATION

Generated	July 2026
MCP Server	Salesforce MCP
Server ID	019d7602-92d0-732e-ac4b-b6b310b73bc7
Platform	Vinkius Cloud for AI Agents
Endpoint	<code>https://edge.vinkius.com/{token}/mcp</code>

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