

MCP SERVER

NO CODE

CLOUD HOSTED

Zoho CRM Analytics MCP

Track Deal Progress and Analyze Pipeline Metrics Instantly

Zoho CRM Analytics provides instant access to your entire Zoho CRM data model through an AI agent. Quickly search leads, manage accounts, and track deals across every module without ever leaving your chat window. Understand complex field structures, analyze pipeline stage probabilities, or pull custom reports just by asking.

A+ Quality Score 100/100

reporting-dashboards

data-visualization

pipeline-analysis

metadata-management

custom-views

business-insights



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.

Zoho CRM Analytics MCP

5 tools available

Cloud-hosted on Vinkius

Managing a big CRM usually means bouncing between tabs: the main account view, the report builder, the lead list, and the contact profile. This MCP changes that. It lets your AI client treat Zoho CRM like one single source of truth.

Need to know how many 'New' leads came from the web form? Just ask. Want to track a deal from initial qualification through proposal stages? Done. The tool gives your agent full visibility into everything, from organizational settings to every custom field structure in your modules.

If you're looking for deep data insights that go beyond standard dashboards, connecting via Vinkius is the way to go. You get instant access to metadata—like knowing exactly what fields exist on a 'Contact' record or listing all saved custom filters—so your agent can build accurate queries and deliver precise answers right when you need them.

Core Capabilities

01 — Discovering CRM data structure

Get full details on every module, field type, and validation rule in Zoho CRM.

03 — Retrieving organizational settings

Access core account details like the company name, default currency, and Zoho CRM edition.

05 — Managing core records

Search, create, or update foundational records like Leads, Contacts, Accounts, and Deals.

02 — Analyzing deal progression

View sales pipeline stages, including associated win probabilities for accurate forecasting.

04 — Listing available reports

See all saved custom views and filters for any module to pinpoint specific report lists.

One Click on Vinkius — From Prompt to Execution

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

- 01 You connect your AI client to the Vinkius catalog and activate this MCP.
- 02 Your agent uses tools like `zoho_list_modules` or `zoho_module_fields` to understand the available data structure in Zoho CRM.
- 03 The agent then executes actions, such as searching for leads from a specific source or running reports on pipeline stages.

The bottom line is that your AI client interprets complex CRM data and runs the necessary queries automatically, giving you the answer without manual clicking.

Built For

Anyone whose job involves deep analysis of customer relationships or sales cycles.

This MCP helps the BDR who can't stop copying/pasting data between spreadsheets and CRM tabs, or the Sales Manager who needs instant pipeline health checks without waiting for a report to run.

BDR (Business Development Rep)

Quickly qualify new leads by searching existing records and creating notes attached to accounts.

Sales Manager

Get an immediate view of the entire sales pipeline, checking deal stages and win probabilities across all active deals.

Account Executive (AE)

Access detailed contact data or check for specific custom views to ensure they have all the required information before a client call.

What Changes When You Connect

- 01 Stop guessing about your data structure. By running the `zoho_module_fields` tool, you instantly see every field type—text, number, picklist—so you know exactly what data you can build queries on.
- 02 Get a real-time view of your sales process with `zoho_list_pipelines`. Instead of manually calculating forecast risk, your agent shows you the stage name and win probability for any deal.
- 03 Forget navigating dozens of dashboards. You can use `zoho_custom_views` to list saved filters like 'All Open Deals' or 'My Contacts,' letting your agent pull reports without manual navigation.
- 04 When onboarding a new team member, use `zoho_list_modules` to generate an instant inventory of every data category available in the CRM for training purposes.
- 05 Quickly understand company setup details. Use `zoho_org_info` to confirm which currency or Zoho edition you're running on without logging into account settings.

Real-World Applications

Need to build a report for only 'Web Form' leads?

A BDR asks their agent: 'Show me all leads from the web form.' The agent uses its knowledge of core record types and saved filters, querying data that would otherwise require navigating complex list views or running specific custom reports.

The Sales Manager needs an updated forecast.

Instead of waiting for the end-of-week meeting dashboard, a manager asks: 'What's the combined win probability of all deals currently in the Proposal stage?' The agent runs through `'zoho_list_pipelines'` and aggregates the risk score instantly.

A team member needs to know what data is available.

A new user asks their agent: 'What kind of information can I track on an Account record?' The agent runs `zoho_module_fields` and returns a clear list of all available field types, solving the metadata problem immediately.

Creating records requires specific fields.

You need to create a new deal but aren't sure of the required fields. You ask the agent: 'What are the necessary details for a Deal?' The agent uses `zoho_module_fields` to guide you, ensuring your submission is complete and valid.

Patterns to Avoid

Trying to write raw API calls**X AVOID**

Writing complex SOAP or REST API queries in a scripting language just to check if 'Accounts' has a field named 'Industry Sector'. This takes time, requires auth keys, and is brittle.

✓ INSTEAD

Let your agent run the `zoho_module_fields` tool. It returns all field details—names, types, and required status—in plain language, making data structure discovery trivial.

Manually checking saved reports**X AVOID**

Opening the Zoho CRM interface and clicking through 'My Leads', 'Open Deals', 'Uncontacted Accounts' to see if a specific filter is set up correctly.

✓ INSTEAD

Ask your agent to run `zoho_custom_views`. It provides an immediate, comprehensive list of all saved filters for any module, telling you exactly what report views are available.

Misunderstanding the sales lifecycle**X AVOID**

Assuming that every deal has a 'Negotiation' stage when in fact your company uses a custom process with different stages. This leads to incorrect forecasting.

✓ INSTEAD

Use `zoho_list_pipelines` to get an accurate, real-time list of your actual sales stages and their associated win probabilities, matching the current business workflow.

The Right Fit

Use this MCP if your primary pain point is data visibility and structure. If you need your agent to understand *what* fields exist on a record, or *how* deals move through defined stages, this connector provides that depth. It's essential for metadata discovery. Don't use it if all you need is basic communication (like sending an email) or simple calendar invites; those tasks require different connectors. If

your goal is merely to search contacts by name and status without deep structural analysis, a simpler messaging tool might suffice. But when the data itself is the problem—when you don't know what reports are possible, or if a field exists—this MCP is non-negotiable.

CRM Data Management Isn't Just Clicking Through Tabs Anymore.

Today, gathering insights from Zoho CRM feels like playing digital Whac-A-Mole. You open the 'Accounts' tab for a list view, then jump to the 'Deals' module to check stages, and finally switch to the 'Contacts' record just to see who last called. It's constant context switching, copy-pasting data points between spreadsheets, and spending half your day just trying to verify which filters are set up correctly.

With this MCP, that process disappears. You don't navigate; you ask. Your agent accesses the full data model—from checking `zoho_list_modules` to finding out every field on a Contact record using `zoho_module_fields`. The result is an instant answer delivered in natural language, turning hours of administrative clicking into seconds of conversation.

Zoho CRM Analytics MCP: Instant Structural Understanding

The biggest time sink used to be figuring out the underlying data. Before you could write a query, you had to manually check if the 'Industry Sector' field was available on Accounts or if it was read-only. This forced multiple logins and manual API documentation cross-referencing just for basic validation.

Now, when your agent runs `zoho_module_fields`, it hands you an immediate, structured breakdown of the entire data schema. You know exactly what fields exist, their types, and if they are required—all without leaving the conversation window.

Zoho CRM Analytics with 5 Tools

These tools let you inspect the underlying structure of Zoho CRM data, allowing your agent to perform advanced analysis on records, fields, and pipelines.

#	TOOL	DESCRIPTION
01	<code>zoho_module_fields</code>	Retrieves field details, including data type and whether it's required or read-only, for any specific CRM module.
02	<code>zoho_org_info</code>	Pulls core account settings like the company name, currency used, and your current Zoho CRM edition.
03	<code>zoho_custom_views</code>	Lists saved custom filters or predefined report views for a module, letting you know what reports already exist.
04	<code>zoho_list_modules</code>	Provides an inventory of every available CRM module (Leads, Contacts, Deals, etc.) and its API status.
05	<code>zoho_list_pipelines</code>	Shows all sales pipeline stages for a deal, along with the associated win probability percentages.

See It in Action

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

U Search for leads from web form



Leads from Web Form

NAME	EMAIL	COMPANY	STATUS
John Smith	john@acme.com	Acme Corp	New
Maria Garcia	maria@beta.io	Beta Inc	Contacted

U Create a deal: Enterprise Plan \$25,000



Deal Created!

- Name: Enterprise Plan
- Amount: \$25,000
- Stage: Qualification
- Closing: 2024-03-30

Frequently Asked Questions

01 How do I find out which modules are available in Zoho CRM using the Zoho CRM Analytics MCP?

You use the `zoho_list_modules` tool. It instantly lists every module—Leads, Accounts, Deals, etc.—and tells you if it's set up for API access.

02 What does the zoho_list_pipelines tool show me?

The `zoho_list_pipelines` tool displays your current sales pipeline stages and gives you the associated win probability percentages, which is critical for accurate forecasting.

03 Can I check if a field exists before creating a record with Zoho CRM Analytics MCP?

Yes, run `zoho_module_fields`. It returns details on every configured property for any module, confirming the field's name, type, and whether it accepts input.

04 How does this MCP help me with reporting? Should I use zoho_custom_views?

The `zoho_custom_views` tool helps by listing all your predefined saved filters. You can ask the agent about these views, so you don't have to guess which report combination already exists.

05 I need organizational details for my CRM setup; what should I use?







Use `zoho_org_info`. This tool quickly fetches key account-level data, including the company name, default currency, and your Zoho CRM edition.

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>"zoho-crm-analytics": { "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

Zoho CRM Analytics 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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