

MCP SERVER

NO CODE

CLOUD HOSTED

# Zoho CRM (Full) MCP

Manage every lead, deal, and account in conversation.

The Zoho CRM MCP gives your AI agent full access to manage every part of your sales pipeline without you ever leaving your chat window. You can search for company accounts, track potential deals, create new leads, and log detailed notes—all through natural conversation. It's complete CRM management built right into your workflow.

**A+** Quality Score 100/100

lead-management

deal-tracking

pipeline-management

crm-automation

account-management

sales-workflow



# 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

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## 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

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## 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

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## 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](https://cloud.vinkius.com) — connect your AI agent in under 60 seconds.

# Zoho CRM (Full) MCP

9 tools available

Cloud-hosted on Vinkius

Stop toggling between tabs just to update a customer record or check the status of an opportunity. This MCP connects Zoho CRM directly to any AI client, letting you manage your entire sales lifecycle using nothing but talk. Need to find a specific contact's phone number? Your agent pulls it up instantly. Want to log notes from yesterday's call? You just ask for it. It handles everything from searching company accounts and qualifying new leads to creating detailed deals and attaching notes to any record type.

Because Vinkius hosts this MCP, you get immediate access to every module—leads, contacts, accounts, and deals—all managed by conversation. This means your AI agent doesn't just read data; it actively updates it. It lets BDRs qualify prospects on the fly and gives managers instant visibility into deal progression, making manual pipeline checks a thing of the past.

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## Core Capabilities

### 01 — Qualifying new potential clients

Search for prospective leads using criteria like company name or source to check their current status in the funnel.

### 03 — Building new deals and opportunities

Create detailed sales opportunities, setting the stage, amount, and expected closing date for tracking revenue.

### 05 — Reviewing current pipeline data

List recent records across multiple CRM modules—like deals, tasks, and contacts—for an immediate overview of activity.

### 02 — Finding specific contacts and accounts

Quickly retrieve contact details, phone numbers, and linked company information by searching existing records.

### 04 — Logging activity history

Attach notes, meeting summaries, or call transcripts directly to any existing record, providing a full audit trail.

# One Click on Vinkius — From Prompt to Execution

Available at [vinkius.com/mcp/zoho-crm-full](https://vinkius.com/mcp/zoho-crm-full) — connect your AI agent in three steps.

- 01** You tell your AI client exactly what you need, for example, 'Find all leads from the recent trade show.'
- 02** The MCP translates that request into a specific tool call to Zoho CRM and retrieves the necessary data.
- 03** Your agent receives the list of records or confirmation of actions taken, allowing you to continue your workflow without ever leaving the chat.

The bottom line is, your AI client speaks the language of your CRM so you don't have to switch apps to work.

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## Built For

This MCP is for anyone who spends too much time in a browser with multiple tabs open. It targets sales reps, business development representatives (BDRs), and sales managers who need real-time data access to close deals faster.

### Sales Representative

Uses the MCP to quickly find contact details for a client and log notes summarizing a meeting right from their chat interface.

### Business Development Rep (BDR)

Qualifies new leads immediately, using tools to create records with source tracking and status updates without manual data entry.

### Sales Manager

Checks the deal progress across multiple pipeline stages or lists recent activities for a team review, getting immediate visibility into revenue potential.

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## What Changes When You Connect

- 01** Stop clicking through tabs to document meetings. You can use the `zoho_create_note` tool to instantly attach meeting summaries or call notes to any record type, keeping your history clean and comprehensive.

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- 02** Never lose track of a prospect again. Use `zoho_search_leads` or `zoho_search_contacts` to find potential customers quickly using just their name or email, regardless of where they are in the funnel.
- 
- 03** Keep your pipeline accurate by creating new opportunities with `zoho_create_deal`. You can set the stage, expected amount, and closing date for immediate tracking without opening Zoho itself.
- 
- 04** Find out who you're talking to. The `zoho_search_accounts` tool lets you search for companies by name, giving you account-level data that ties together contacts and deals.
- 
- 05** Quickly qualify new prospects using `zoho_create_lead`. You provide the details like source and status, and the record is ready for immediate sales follow-up.
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- 06** Get a full picture of activity flow. By calling `zoho_list_records`, you can pull recent tasks or events across various modules to give stakeholders an instant overview.
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## Real-World Applications

### Checking on a deal mid-call

A sales rep needs to verify the status of a major opportunity. Instead of interrupting the call, they ask their agent to run `zoho_search_deals` for 'Acme Mega Contract.' The agent returns the current stage and amount instantly.

### Completing post-meeting follow-up

A support team member finishes a client call. They use `zoho_create_note` attached to the customer's account record, summarizing all technical issues and next steps for the sales team.

### Onboarding a new BDR

A new BDR finds a list of leads from an external source. They ask their agent to use `zoho_create_lead` for each one, providing the name, company, and setting the initial status to 'Contacted' in bulk.

### Preparing for a quarterly review

A sales manager needs visibility on company health. They ask their agent to use `zoho_search_accounts` to pull details on three key target companies, confirming annual revenue and owner information for the meeting.

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# Patterns to Avoid

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## Trying to manually update data

### X AVOID

The user copies a deal amount from an email, opens Zoho CRM in a separate tab, navigates to the correct account, finds the deal, and pastes the new number. This takes 90 seconds.

### ✓ INSTEAD

Tell your agent directly: 'Update the Enterprise Plan deal for Acme Corp with \$26,500.' The MCP handles the entire flow, calling ``zoho_search_accounts`` first, then modifying the record.

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## Forgetting which module holds data

### X AVOID

The user asks, 'Where is the note about the Q3 meeting?' and gets a generic list of records that requires manual filtering to find the right context.

### ✓ INSTEAD

Use ``zoho_list_records`` and specify the module type (e.g., 'Notes') or use ``zoho_search_contacts`` first, then ask for notes linked to that contact record.

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## Creating a lead without context

### X AVOID

The user simply inputs raw data into an agent and forgets to specify the source or status. The resulting lead is unusable because it lacks crucial pipeline information.

### ✓ INSTEAD

Use ``zoho_create_lead`` and explicitly provide all required fields, like 'Web Download' for the source and 'Not Contacted' for the initial status.

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## The Right Fit

You should use this MCP if your primary pain point is context switching. If you find yourself opening Zoho CRM in a separate browser tab just to check a deal stage or log a note, this is for you. It makes your entire sales workflow conversational and immediate.

Don't use this if you only need simple data viewing that doesn't require modification (e.g., 'What was the average deal size last year?'). For pure reporting or analytics requiring complex database queries, a dedicated BI tool might be better. However, if your goal involves *action*—creating records ( `zoho_create_deal` ), updating notes ( `zoho_create_note` ), or searching for specific entities ( `zoho_search_contacts` )—this MCP is the most direct path.

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## The CRM Tab Switching Nightmare

Right now, managing a single client interaction requires jumping through hoops. You read an email, copy down contact details, open Zoho CRM in one tab to find the account ID; switch to another tab to check the deal stage; and finally, you have to return to the chat window to paste notes about the call into a third module. It's slow, it's frustrating, and you lose context.

With this MCP, all that manual friction disappears. You just tell your agent what happened during the call—the key contacts, the new deal amount, the follow-up required. The system handles searching for records and writing the notes or deals in the background. What you get is a single, continuous conversation that actually moves the needle.

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## Zoho CRM (Full) MCP: Deal Tracking Made Conversational

Previously, updating deal status was a multi-step process. You had to find the specific account, navigate through the Deals module, locate the correct opportunity, and manually change the stage dropdown from 'Needs Analysis' to 'Proposal/Price Quote.'

Now, you simply tell your agent: 'Move Acme Corp's proposal deal to Negotiation.' The MCP executes the necessary steps within Zoho CRM, updating the record instantly. It eliminates clicks and makes pipeline progression part of the conversation.

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# Zoho CRM (Full) with 9 Tools

These tools give your agent granular control over every part of your Zoho CRM data set, from initial lead capture to final deal closure.

#	TOOL	DESCRIPTION
01	<code>zoho_create_contact</code>	Creates a new contact record in Zoho CRM, linking them to an existing company and populating their name, email, and phone number.
02	<code>zoho_create_deal</code>	Generates a new sales opportunity by setting the deal name, expected amount, stage, and closing date within Zoho CRM.
03	<code>zoho_create_lead</code>	Enters a brand-new lead into Zoho CRM, capturing their details along with its source (e.g., web form) and initial status for pipeline tracking.
04	<code>zoho_create_note</code>	Adds an internal note or meeting summary to any existing record—whether it's a lead, account, deal, or contact—for historical logging.
05	<code>zoho_list_records</code>	Retrieves a list of recent records from nearly any Zoho CRM module, useful for getting a broad overview of activities like tasks or events.
06	<code>zoho_search_accounts</code>	Finds and returns details about specific companies or organizations (Accounts) within your CRM by name, providing the core business entity record.
07	<code>zoho_search_contacts</code>	Searches for converted prospects or existing customers using a contact's name or email address to find their full profile details.
08	<code>zoho_search_deals</code>	Looks up specific sales opportunities by name, returning key data like the current stage, monetary value, and closing date for quick status checks.
09	<code>zoho_search_leads</code>	Searches the top of the funnel to find potential customer leads using criteria like email or company name to check their qualification status.

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## 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

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## Frequently Asked Questions

### 01 How does the `zoho_create_deal` tool work?

The `zoho_create_deal` tool lets you generate a new sales opportunity by supplying key details like the name, amount, expected stage, and closing date. It's how you log fresh revenue potential into your pipeline.

### 02 Can I update notes using the `zoho_create_note` tool?

Yes. The `zoho_create_note` tool allows you to attach any kind of text, like a meeting summary or call transcript, directly to an existing lead, contact, deal, account, or other record.

**03 What if I need to find a customer's phone number?**

You can use `zoho\_search\_contacts` and provide the name or email. The tool returns the full profile details, including their linked account and current contact information.

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**04 Is zoho\_list\_records useful for general oversight?**

Absolutely. This tool queries recent activity across many Zoho modules—like tasks, events, or calls—giving you a broad overview of what's been happening in the CRM recently.

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**05 Do I need to know the Account ID before using zoho\_create\_contact?**

No. While some tools benefit from existing IDs, `zoho\_create\_contact` handles linking the contact to an existing account when you provide that context in your request.







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# Go Live in 60 Seconds

Get your connection token from [cloud.vinkius.com](https://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
 <b>Claude AI</b>	Profile → Customize → Connectors → "+" → Add custom connector → Paste endpoint
 <b>Cursor</b>	Settings → Features → MCP Servers → "+ Add New MCP Server" → Type: SSE → Paste endpoint
 <b>VS Code</b>	Ctrl/Cmd+Shift+P → "MCP: Add Server" → add <code>"zoho-crm-full": { "url": "..."</code>
 <b>Windsurf</b>	MCP Settings → <code>mcp_settings.json</code> → Add endpoint URL
 <b>ChatGPT</b>	Settings → Tools & plugins → Add MCP server → Paste endpoint
 <b>Gemini</b>	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 (Full) 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](https://vinkius.com) · [support@vinkius.com](mailto:support@vinkius.com)

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