

MCP SERVER

NO CODE

CLOUD HOSTED

# Zoho CRM Sales MCP

Track deals and manage the full sales lifecycle.

Zoho CRM Sales MCP handles your entire sales cycle, letting you manage leads, accounts, contacts, and opportunities without leaving your chat window. From searching product catalogs to generating quotes and tracking invoices, it puts full revenue operation visibility right at your fingertips through any AI client.

**A+** Quality Score 100/100

deal-management

sales-orders

account-management

pipeline-tracking

lead-nurturing

revenue-operations



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

# Zoho CRM Sales MCP

10 tools available

Cloud-hosted on Vinkius

Managing a deal means jumping between five different applications: the contact list, the product catalog, the deal tracker, the quote generator, and the invoicing system. This MCP connects all of that data in Zoho CRM to your agent. You don't have to switch tabs or copy data anymore. Need to check if an account is active? Your AI client finds it. Is there a new lead from a web form? It tracks the source and status for you. When a deal progresses, you can update its stage and amount instantly. If you need pricing, your agent generates quotes linked directly to the opportunity, or pulls up outstanding invoices for billing review. This isn't just data retrieval; it's full lifecycle management right where you work. By connecting this MCP through Vinkius, your AI client gets access to a centralized command center for every sales action.

---

## Core Capabilities

### 01 — Track and Advance Opportunities

Search all active deals by name, track their current stage (like Qualification or Negotiation), and update the deal status when progress is made.

### 03 — Generate Pricing Documents

Create formal sales quotes linked to a deal or generate new products to add to your catalog.

### 02 — Manage Customer Records

Find companies, locate related contacts, and search for existing leads using source and status information.

### 04 — Handle Billing and Orders

List pending invoices, check the status of sales orders, and get full details on any specific opportunity record.

# One Click on Vinkius — From Prompt to Execution

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

- 01 Tell your AI client exactly what you need to do; for example, 'Find all deals in the Negotiation stage for Acme Corp.'
- 02 The MCP sends a request to Zoho CRM, pulling together account details, deal status, and necessary product information.
- 03 Your agent processes the data and presents it back to you—whether that's a list of accounts, a generated quote, or an updated deal record.

The bottom line is you get full sales visibility without ever leaving your chat window.

---

## Built For

This MCP is for revenue operations teams and anyone whose job involves moving a customer from initial contact to signed contract. If you spend more time switching between Zoho, Excel, and email than actually selling, this tool saves your day.

### Sales Representatives

You use the MCP to quickly find account details or generate a quote for an opportunity while talking to a client.

### BDRs (Business Development Reps)

You qualify leads and create new records, like finding and creating contacts linked to accounts, without manual data entry.

### Sales Managers

You pull reports on pipeline status, track deal progress across stages, and check if the latest invoices were correctly generated.

## What Changes When You Connect

- 
- 01 Move deals through the pipeline instantly. Instead of logging into Zoho to change a stage, your agent uses `zoho_update_deal` to advance an opportunity from 'Qualification' to 'Proposal/Price Quote', keeping records accurate.

---

  - 02 Generate and track pricing documents without context switching. Use `zoho_create_quote` to build formal proposals linked directly to the relevant deal and account within a single chat session.

---

  - 03 Maintain perfect visibility on revenue status. You can run searches using `zoho_search_deals` to get an immediate overview of all active opportunities, showing amounts and closing dates at a glance.

---

  - 04 Handle billing inquiries instantly. Instead of asking accounting for data, you use `zoho_list_invoices` to pull up outstanding invoices, checking the total amount and due date right away.

---

  - 05 Manage your inventory catalog effortlessly. If you need pricing details or product codes, just search using `zoho_search_products`, which is much faster than navigating a separate product menu.

---

  - 06 Keep all customer interactions centralized. Your agent can pull up comprehensive records on any deal using `zoho_get_deal` — a single source of truth for history and custom fields.
- 

---

## Real-World Applications

### The Sales Rep needs a quick price check.

A client asks, 'What's the unit cost for X?' Instead of searching the product catalog manually, the agent runs ``zoho_search_products`` and replies immediately with the exact name, SKU, and current unit price.

### The BDR needs to formalize a new lead.

A web form generates a high-quality lead. The agent first searches for related accounts using ``zoho_search_deals`` to see if the company exists, then uses ``zoho_create_deal`` to establish a structured opportunity in the CRM.

**The Manager needs an end-of-week pipeline snapshot.**

The manager prompts the AI client for 'all deals nearing closure.' The agent executes ``zoho_search_deals``, returning a concise list of opportunities, their current stage, and probability score.

**The Account Executive needs to follow up on billing.**

A customer calls asking about payment status. Instead of calling the finance department, the agent uses ``zoho_list_invoices`` to check the subject, total amount, and whether the invoice is marked as paid.

---

## Patterns to Avoid

---

**Trying to find all deal info by name.****X AVOID**

If you only search for 'Acme Corp' in your AI client, it might give you a list of contacts or accounts, but not the full progress history of their biggest opportunity.

**✓ INSTEAD**

To get everything on one specific deal, use ``zoho_get_deal``. This tool pulls all custom fields, notes, and history for that single ID, giving you the complete picture.

**Updating a deal without noting why.****X AVOID**

The agent changes the status to 'Closed Won' but forgets to note that the contract was signed on March 15th. The record is technically correct but missing crucial context for audits.

**✓ INSTEAD**

Always pair ``zoho_update_deal`` with a request to create a detailed note, ensuring your AI client captures *\*why\** and *\*when\** the stage or amount changed.

**Creating products without linking them.****X AVOID**

You use ``zoho_create_product`` to add 'Premium Widget' but forget that this product is only relevant for certain enterprise accounts. The data gets lost in a general catalog list.

**✓ INSTEAD**

When generating quotes, always make sure the new products are correctly used within the workflow of ``zoho_create_quote``, linking them directly to the right deal.

## The Right Fit

Use this MCP if your primary pain point is moving sales data between different Zoho CRM modules or if you need real-time visibility into the full lifecycle, from initial lead creation through quoting and invoicing. If your process relies heavily on integrating with external systems outside of Zoho (like a custom inventory management system or proprietary ERP), then this MCP might only

solve part of the problem. Don't expect it to handle complex tax calculations or multi-currency conversions that aren't explicitly tied to a quote or invoice flow; for those, you'll need specialized financial tools. If you are simply managing general task lists unrelated to revenue, stick with your existing project management software.

---

## The time spent switching tabs is killing your sales momentum.

Right now, if a client asks about pricing, you open the CRM, check the account data in one tab. Then, you jump to the product catalog in another. You build the quote details and move it over to a third window for approval tracking. This copy-pasting cycle slows down every conversation and increases the chance of using old data.

With this MCP, your agent handles the handoffs. You tell your AI client what you need—say, 'Draft a quote for Acme Corp.' It pulls the account details, finds the correct products, and generates the formal proposal in one go. You get accurate answers instantly; you don't waste time clicking through dashboards.

---

## Zoho CRM Sales MCP: Full Deal Visibility

You eliminate the need to manually cross-reference deal stages, product SKUs, and billing status. The agent handles these connections for you.

Now, your entire sales process moves at conversational speed. You get a single, unified view of every customer's journey—from lead search to final invoice.

---

# Zoho CRM Sales: 10 Workflow Tools

Use these tools to manage every part of the sales process, allowing your AI agent to create quotes, track deals, and list invoices without manual data entry.

| #  | TOOL                                | DESCRIPTION   |
|----|-------------------------------------|---|
| 01 | <code>zoho_create_deal</code>       | Creates a new sales opportunity in Zoho CRM by setting its name, current stage, amount, and expected closing date.              |
| 02 | <code>zoho_create_product</code>    | Adds a new product to your internal catalog with a required name, unit price, and unique product code (SKU).                    |
| 03 | <code>zoho_create_quote</code>      | Generates a formal sales quote in Zoho CRM, linking it to an existing deal and account with subject details and validity dates. |
| 04 | <code>zoho_get_deal</code>          | Retrieves complete details for one specific deal by ID, including notes, history, amounts, and custom fields.                   |
| 05 | <code>zoho_list_invoices</code>     | Lists all billing documents in Zoho CRM, showing the subject, total amount, due date, and if payment has been received.         |
| 06 | <code>zoho_list_quotes</code>       | Retrieves a list of formal price proposals, including their total quoted amount, account linkage, and expiration status.        |
| 07 | <code>zoho_list_sales_orders</code> | Lists confirmed customer purchase commitments by showing the subject, current status, total, and expected fulfillment date.     |
| 08 | <code>zoho_search_deals</code>      | Searches for active sales opportunities across all stages to find names, amounts, linked accounts, and closing dates.           |
| 09 | <code>zoho_search_products</code>   | Looks up items in the Zoho CRM product catalog by name, returning their unit price, SKU code, and description.                  |
| 10 | <code>zoho_update_deal</code>       | Changes an existing deal's status, amount, or expected closing date to accurately reflect pipeline movement.                    |

---

## 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 use the `zoho_search_deals` tool with Zoho CRM Sales?

You tell your AI client what you are looking for, like 'Show me all deals in the Negotiation stage.' The agent runs ``zoho_search_deals`` and returns a list containing the deal name, amount, account, and closing date.

### **02** Can I use `zoho_create_quote` to estimate prices?

Yes. You run ``zoho_create_quote``, providing a subject and linking it to an account and deal. This creates the formal proposal record, which you can then track later with ``zoho_list_quotes``.

---

**03 What is the best way to update a deal's progress?**

Use `zoho\_update\_deal`. You simply instruct your agent on the change, such as 'Advance this deal to Proposal/Price Quote,' and it updates the stage record correctly.

---

**04 Does zoho\_list\_invoices show overdue payments?**

Yes. The tool lists invoices with details like the subject, total amount, due date, and explicitly states whether payment has been received or not.

---

**05 How do I add a new product to my catalog using this MCP?**

Use `zoho\_create\_product`. You provide the name, unit price, and unique SKU code. This adds it immediately so you can reference it in quotes or orders.







---

# 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-sales": { "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 Sales 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)

### INDEPENDENT PLATFORM DISCLAIMER

Vinkius is an independent platform and is not affiliated with, endorsed by, sponsored by, verified by, or otherwise authorized by Zoho CRM Sales. All third-party trademarks, logos, and brand names are the property of their respective owners. Their use in this document is strictly for informational purposes to identify service compatibility and interoperability.

### DOCUMENT INFORMATION

|            |   |
|------------|---|
| Generated  | June 2026   |
| MCP Server | Zoho CRM Sales MCP  |
| Server ID  | 019d762b-209d-738e-9316-6765bae2acdf  |
| Platform   | Vinkius Cloud for AI Agents   |
| Endpoint   | <a href="https://edge.vinkius.com/{token}/mcp">https://edge.vinkius.com/{token}/mcp</a> |

### LICENSE & USAGE

This document is generated automatically by the Vinkius PDF Engine. Content reflects the MCP server configuration at the time of generation and may change as updates are deployed. For the most current information, visit [vinkius.com/mcp/zoho-crm-sales](https://vinkius.com/mcp/zoho-crm-sales).