ADMIN, DATA AND PLATFORM · HOSTED MCP SERVER

MCP-Connected Agent

Publishes two governed Salesforce tools on a Salesforce hosted MCP server so an outside AI assistant can look up an account and create a support case, and nothing else.

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4	4	6	2	8
SUBAGENTS	ACTIONS	OBJECTS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Step 1
Only two tools are visible to the assistant.

Step 2
The integration user cannot update or delete any record.

Step 3
Priority, length and rate checks block bad calls.

Step 4
Cases carry Origin "External Assistant".

THE RULES IT FOLLOWS

- **Least privilege**
  The server publishes two tools. No update, delete or open query tools.
- **Rate limit**
  Reject more than 20 write calls per caller per hour.
- **Return only the five Account fields listed**
  No revenue or contact details.
- It may only create a Case and must refuse any other request.

NOT INCLUDED

- Write tools for Opportunities, Leads or Accounts.
- Delete or bulk tools.
- Data Cloud queries over MCP.

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, MCP

RUNS ON
Salesforce with hosted MCP servers, Service Cloud for Case, Agentforce only if the agent tool is added

BEST FOR
Account managers using an external assistant such as Claude, the admin who governs the tools, sales managers, support teams and operations leads

INDUSTRIES
Cross-industry · Software companies · Professional services · Financial services · B2B sales · Customer service · Agencies · Consulting

WHAT YOU NEED

- ✓ Hosted MCP servers available in the org.
- ✓ An external assistant that supports MCP.
- ✓ Service Cloud for Case.
- ✓ The names of allowed callers.

Coming soon. Designed in full and built to the same standard as the live agents.

Free scoping: a 60-minute review with an architect.
We map it to your org, your rules and your data, and give you a fixed plan before work starts.

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