

# 22.2 MCP Server

The **MCP Servers** section allows you to publish, through vtenext, an **MCP endpoint** that makes CRM tools and operations available to compatible external clients. In practice, this section is used to define which MCP server to expose and which tools to publish through it.

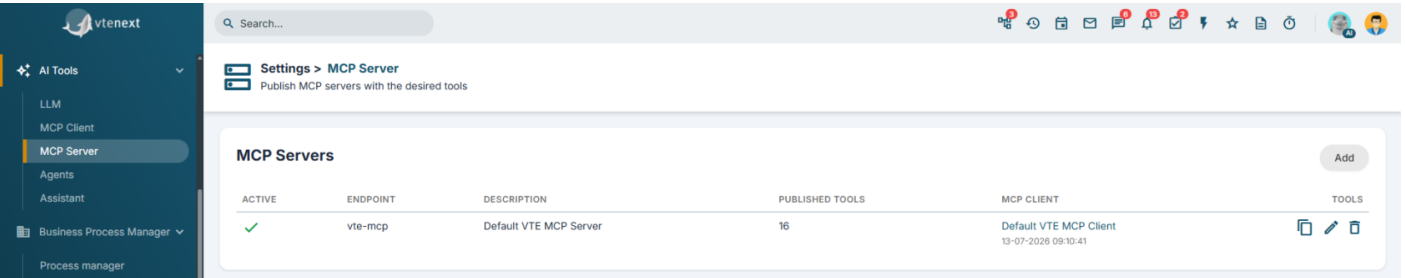
**In summary:** an **MCP server** is not an AI model and does not replace an AI agent. It is an access point that securely exposes CRM functions, allowing compatible **MCP clients** to invoke them from external applications.

## When to use it

- To expose CRM tools to external **MCP-compatible clients**.
- To precisely select which operations should be made available.
- To create a stable internal endpoint for use in AI integrations.
- To generate, if required, an **MCP client** connected to the same server.

## The List View

The list displays all previously configured **MCP servers**.



|                 |                                                                     |
|-----------------|---------------------------------------------------------------------|
| Active          | indicates whether the server is enabled and publicly available      |
| Endpoint        | identifier of the published server                                  |
| Description     | descriptive text for the server                                     |
| Published Tools | number of tools made available through the server                   |
| MCP             | associated MCP client, if any, including its synchronization status |

From the list, you can create a new server, edit an existing one, delete it, or copy its full URL.

# Creating a New MCP Server

The screenshot shows the 'Configure MCP Server' page in the Vtenext application. The left sidebar contains a navigation menu with 'AI Tools' expanded, showing options like LLM, MCP Client, MCP Server (selected), Agents, and Assistant. Below this is the 'Business Process Manager' section with various tool categories. The main content area is titled 'Settings > MCP Server' and 'Publish MCP servers with the desired tools'. It features a 'Configure MCP Server' form with fields for 'Active' (checked), 'Base URL' (https://trial02.vtecrm.net/43807/restapi/v1/vtews/), 'Endpoint' (https://trial02.vtecrm.net/43807/restapi/v1/vtews/), and 'Description'. There is a 'Create MCP client' checkbox. Below the form is a 'Published tools' section with a search bar and a grid of tool cards. The tools are categorized into 'Base', 'Processes', and 'SDK tools'. The 'Base' category includes tools like 'create', 'delete', 'describe', 'listtypes', 'processes.processes\_relat ed\_to', 'query', 'relate', 'retrieve', 'retrieveInventory', 'touch.get\_associated\_prod ucts', 'touch.get\_currencies', 'touch.get\_notifications', 'touch.get\_ticket\_comment s', 'touch.write\_ticket commen t', and 'updateRecord'. The 'Processes' category includes 'esempio\_processo\_tool'. The 'SDK tools' category includes 'convert\_lead', 'get\_current\_context', 'process\_text', 'summarize', 'tools\_manual', and 'translate'. The 'get\_current\_context' and 'tools\_manual' tools are selected.

**Configure MCP Server**

Configure the MCP servers that vtenext exposes. For each server, select the tools to publish.

Active ☒

Base URL

Endpoint  Unique identifier used in the server URL endpoint.

Description

Create MCP client ☐ Automatically create an MCP client entry pointing to this server. The client will be kept in sync and deleted when the server is removed.

**Published tools**

Search... (2 / 22 selected)

**Base**

**create**  
Create a record of the specified module. To understand the fields of the specified module, you should us...

**delete**  
Delete the specified record

**describe**  
Describe the specified module and their relative fields

**listtypes**  
List the modules that have fields with 'litype' of the specified formats

**processes.processes\_relat ed\_to**  
Retrieves all processes related to a specific CRM record.

**query**  
Safely execute a SQL-like query and return the result's rows

**relate**  
Relate the record with all the records in a relatelist array

**retrieve**  
Illustrate the fields of the specified record and their relative values

**retrieveInventory**  
Illustrate the fields of the specified Inventory record, their relative values and the product block's information

**touch.get\_associated\_prod ucts**  
Retrieves the list of products associated with an inventory record (Invoices, Quotes, etc.).

**touch.get\_currencies**  
Retrieves the list of active or all configured currencies in the system.

**touch.get\_notifications**  
Retrieves system notifications for the current user.

**touch.get\_ticket\_comment s**  
Retrieves the internal comment thread for a specific HelpDesk ticket.

**touch.write\_ticket commen t**  
Creates a comment specifically for a Trouble Ticket (HelpDesk). Triggers ticket-specific email notifications.

**updateRecord**  
Update the specified record with new information

**Processes**

**esempio\_processo\_tool**  
Aggiorna

**SDK tools**

**convert\_lead**  
Starts the process for lead conversion

**get\_current\_context**  
Fetches general context information relevant for use with other MCP tools (so it does not need any parameters...

**process\_text**  
Rewrite or improve the supplied text using an optional tone of voice and complexity level.

**summarize**  
Generate a summary of a VTENEXT record. Use this tool whenever the user asks for a summary, recap...

**tools\_manual**  
Fetches additional information relevant for use with other MCP tools; this is especially needed for tools th...

**translate**  
Translate a Messages email thread into the language of the user interacting with the assistant. Use th...

1. Open the **MCP Servers** section.
2. Click **Add**.
3. Check the **Base URL** displayed by the system and verify that it is accessible from outside the network.
4. Enter the **Endpoint** name.
5. Add a **Description**, if needed.
6. Choose whether to also create the associated **MCP client**.
7. Select the tools to publish.
8. Save the configuration.

# Configuration Parameters

Configure MCP Server

SaveCancel

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Active

☒

Base URL

https://trial02.vtecrm.net/43807/restapi/v1/vtews/

Endpoint

https://trial02.vtecrm.net/43807/restapi/v1/vtews/

Unique identifier used in the server URL endpoint.

Description

Create MCP client

☐

Automatically create an MCP client entry pointing to this server. The client will be kept in sync and deleted when the server is removed.

|                   |                                                                                                                                                                              |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Active            | makes the server available for use                                                                                                                                           |
| Base URL          | initial part of the server address (\$site_URL), displayed as read-only. It is automatically generated by the system                                                         |
| Endpoint          | final identifier of the server. It is the part that completes the public URL of the MCP server. It must be unique and may contain letters, numbers, underscores, and hyphens |
| Description       | used to explain the purpose of the server to administrators or users responsible for maintaining it                                                                          |
| Create MCP Client | automatically creates an MCP client pointing to this server. The connection is kept synchronized and, if the server is deleted, the associated client is also removed        |

# Published Tools Selection

After the main fields, the screen displays the section dedicated to the published tools.

## Published tools

(2 / 22 selected)

### Base

Select

**create**  
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**retrieve**  
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**retrieveInventory**  
Illustrate the fields of the specified inventory record, their relative values and the product block's information

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The available tools can come from multiple areas of the system, for example:

- Base Tools
- SDK Tools (see [MCP Server](#) for further details)
- [Processes](#)

You can select them by group or quickly search for them using the search field. Some basic tools are automatically maintained by the system, even if they are not manually selected, to ensure the correct operation of the integration.

# Practical examples

## Example 1: MCP server for internal CRM tools

You can create a server dedicated to a limited set of tools, for example only those required by an internal assistant or a controlled integration.

## Example 2: MCP server with connected client

If you want the server to be immediately usable from the client side as well, you can enable the **Create MCP Client** option. In this way, vtenext automatically prepares the client that connects to that server.

## Example 3: Selective tool publishing

If you do not want to expose all available functions, you can publish only the tools that are actually required. This approach helps keep the integration more organized and controlled.

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