Unit 2 - Make MCP client

UNIT 2 - MAKE MCP CLIENT

- 2.1 Unit Introduction
- 2.2 Make MCP client
- 2.3 MCP tools for AI agents
- 2.4 MCP in Make scenarios
- 2.5 Wrap up

Unit 2
Make MCP client

2.1 Unit Introduction

You've reached unit 2 of the MCP course.

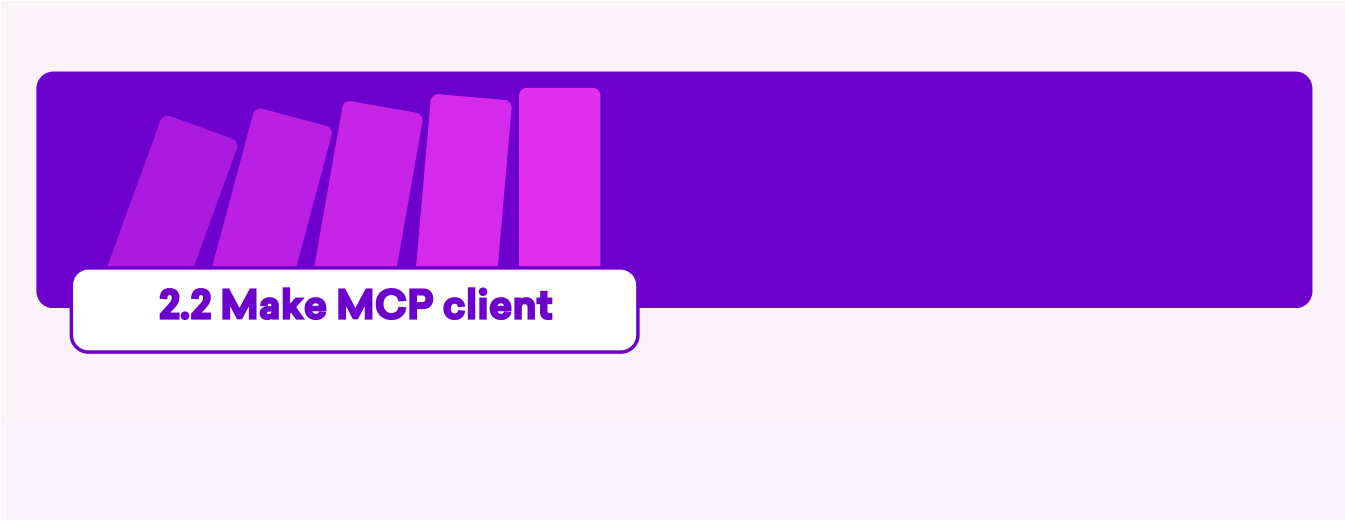
In the previous unit, you've learned the theory of MCP. Now it's time to see how this works in Make, starting with the Make MCP client.

You will learn:

- what you can do with the Make MCP client
- when to use it and what benefits it offers
- how to use the Make MCP client

Let's begin!

Continue to 2.2: Make MCP client



Make provides an MCP client.

The Make MCP Client lets you use tools from MCP servers, so you can connect to external services and tools without writing code or setting up custom integrations.

This means that Make has built its own MCP client that allows you to connect to any third-party MCP server and **use their tools directly in your AI agents and scenarios**.

You can connect to Salesforce's MCP server so your AI agent can look up customer information and update records in real-time. You can also use it in your Make scenario to automatically sync leads and track deal progress.

The Make MCP client makes it easy to use tools and services that aren't part of Make's standard apps.

Here's why you should use it:

✅ **Server selection**
Select from Make's list of verified MCP servers or enter a custom server URL.

🚀 **Quick setup**
Connect to tools just by creating a connection, no manual API configuration is required.

🔐 **Secure connections**
Use OAuth to connect to MCP servers without entering passwords directly.

⚡ **Tool visibility**
Once connected, all available tools appear with information about their required and optional fields.

In Make, you can use the **Make MCP client** in two ways:

- With your AI agents
- Within your Make scenarios

Let's look at each one.

Continue to 2.3: MCP tools for AI agents

2.3 MCP tools for AI agents

You can connect your AI agent to MCP servers and give it access to additional tools.

When adding tools to your AI agents, you have three options:

1. Make scenarios
2. Make modules
3. MCP

MCP is an easy and straightforward way to access tools from external services.

Continue to 2.3.1: When to use it

2.3.1 When to use it

When should you use MCP tools versus modules or scenarios in your AI agents?

It depends on how complex your task is.

MCP tools

👆 Simple action

The MCP tool exists, and you want to perform simple and straightforward action.

Example: create this task in Asana if it's not already present.

Scenario tool or module tool

🤝Combine AI decisions with deterministic workflows

Scenarios let you mix the best of both approaches: the AI Agent uses non-deterministic decision-making to choose when to trigger an action based on context, while the scenario uses deterministic execution to ensure the steps happen in a fixed, reliable order.

Example: The AI Agent decides a refund is needed, then triggers a scenario that always follows the exact sequence: *verify account → process refund → update CRM → send email*.

🔒 Privacy and confidential information

Use scenarios when you need to control what data the AI can access. Scenarios let you share only the necessary information, hiding confidential projects, workspaces, or personal data. In contrast, MCP tools make all available data accessible to the AI with no filtering.

Example: For medical appointments send only patient IDs to the AI, not the full medical records.

⚠️ Critical actions requiring extra control

Use scenarios when working with important data because they provide safety features that help prevent accidental deletion or modification. With scenarios you can add validation checks that stop the system from executing dangerous operations.

Example: for a GDPR account deletion the scenario checks if account is safe to delete before proceeding.

🔀 Complex data mappings

When you need to create records by matching IDs across different systems, scenarios help with handling the data.

Example: Moving leads from Hubspot to Salesforce when the same company has different IDs in each system.

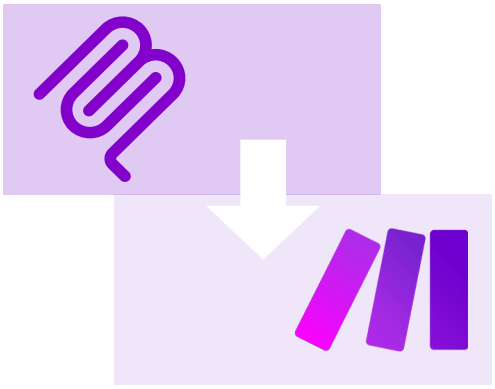
General rule

If your task is straightforward, use MCP tools.

If it's complicated, handles sensitive data, or requires specific steps in a specific order,

use module tools or build a scenario instead.

When you use MCP tools in your AI Agent, they come directly from the MCP server with their exact descriptions and input/output structure. You'll work with them exactly as the server provides them, which means you don't have the option to customize how they're described or modify their parameters and responses.



MCP tools

You cannot change or customize tool descriptions, inputs, or outputs. The AI Agent works with the exact descriptions, parameters, and data structure provided by the MCP server.

Make scenarios

You have full control to write the tool descriptions, select which input fields to show, and filter outputs to return only relevant and secure data. This lets you personalize how the AI Agent understands and uses the tools while maintaining control over sensitive information.

Continue to 2.3.2: Real-life examples

2.3.2 Real-life examples

Let's have a look at two real-life examples.

1: Customer invoice management AI agent

1

💰 Customer invoice management AI agent

🎯 Objective

Build an AI agent that automatically handles customer payments for an online shop. The AI agent will investigate payment issues, identify problems (duplicate charges, failed payments), and create tasks for the team to process refunds.

🏗️ How to do it

Connect your AI Agent to MCP servers:

- **Stripe MCP server** for payment operations (search customers, list charges, create refunds)
- **Asana MCP server** for for task management (create refund tasks and check task status)

🎬 See it in action

A customer emails: *I was charged twice for order #12345*.

The AI searches Stripe and identifies the duplicate charge. Then it creates a task in Asana for the sales team to process the refund.

The sales team member processes the refund and updates the task status in Asana. The AI monitors the task status and automatically notifies the customer once the refund is marked complete.

2: Meeting assistant AI agent

2

📅 Meeting assistant AI agent

🎯 Objective

Build an AI agent that manages a sales director's daily schedule by analyzing meeting locations and travel logistics. The AI agent reviews calendar events, calculates travel times between locations, adds travel blocks automatically, and alerts the team about scheduling conflicts or impossible commutes.

🏗️ How to do it

Connect your AI Agent to MCP servers and Make scenarios:

- **Google Calendar MCP server** to read meeting schedules and add travel time blocks
- **Google Maps API** (via Make scenario) to calculate travel times and distances between meeting locations

🎬 See it in action

The AI agent checks the Sales Director's calendar each morning. Today's schedule shows: 9 AM meeting in downtown office, 11 AM client meeting 25 miles away, and 12 PM lunch meeting back downtown.

The AI agent calculates travel times using Google Maps and identifies a problem: the 11 AM meeting location is 40 minutes away, making it impossible to attend the 12 PM meeting on time.

It sends a Slack alert: ⚠️ *Schedule conflict detected: Travel time between 11 AM and 12 PM meetings is 40 minutes, but only 1 hour available. Recommend rescheduling 12 PM meeting to 1 PM.*

It also automatically adds a 40-minute travel block after the 11 AM meeting to the calendar.

Continue to 2.3.3: How to use it

2.3.3 How to use it

You can add MCP tools to your AI agent directly from within the agent scenario.

To do so, hover over the **+** button of the **Run an agent** module and select Add tool. Then select the **MCP Client> Call a tool module**. Then you need to write a tool name and description. This helps the agent understand what the module does and when to use it.

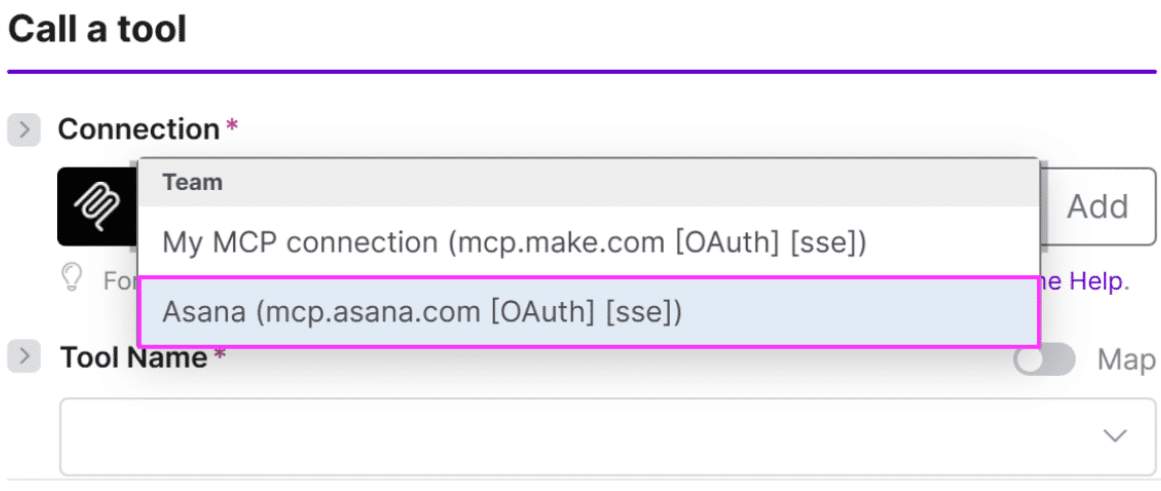
Next, you need to set up the MCP module by creating a connection to an MCP server.

There are three ways to do this.

Click each one to learn more.

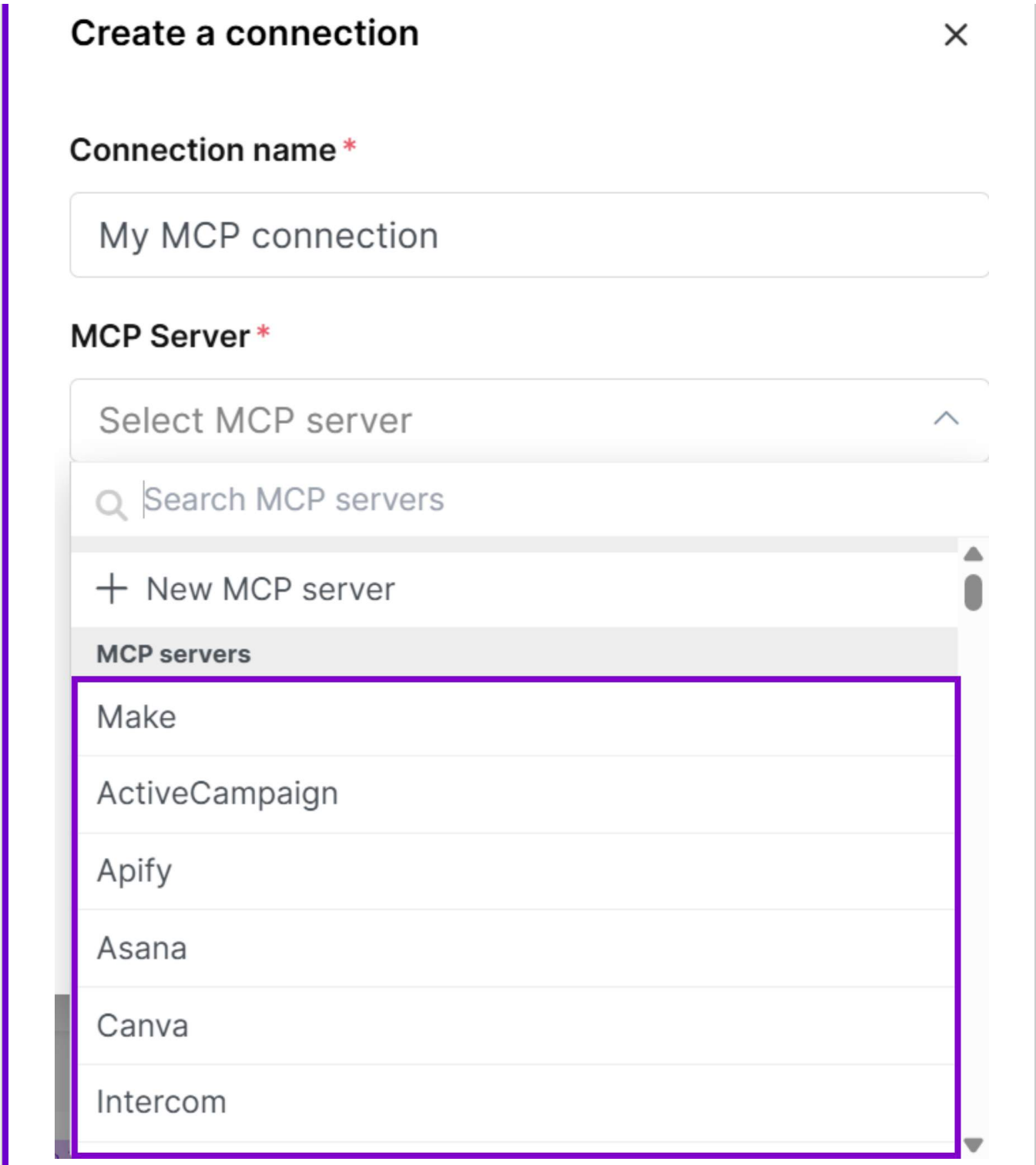
Use an existing connection

Select one of the MCP servers you've previously connected to.



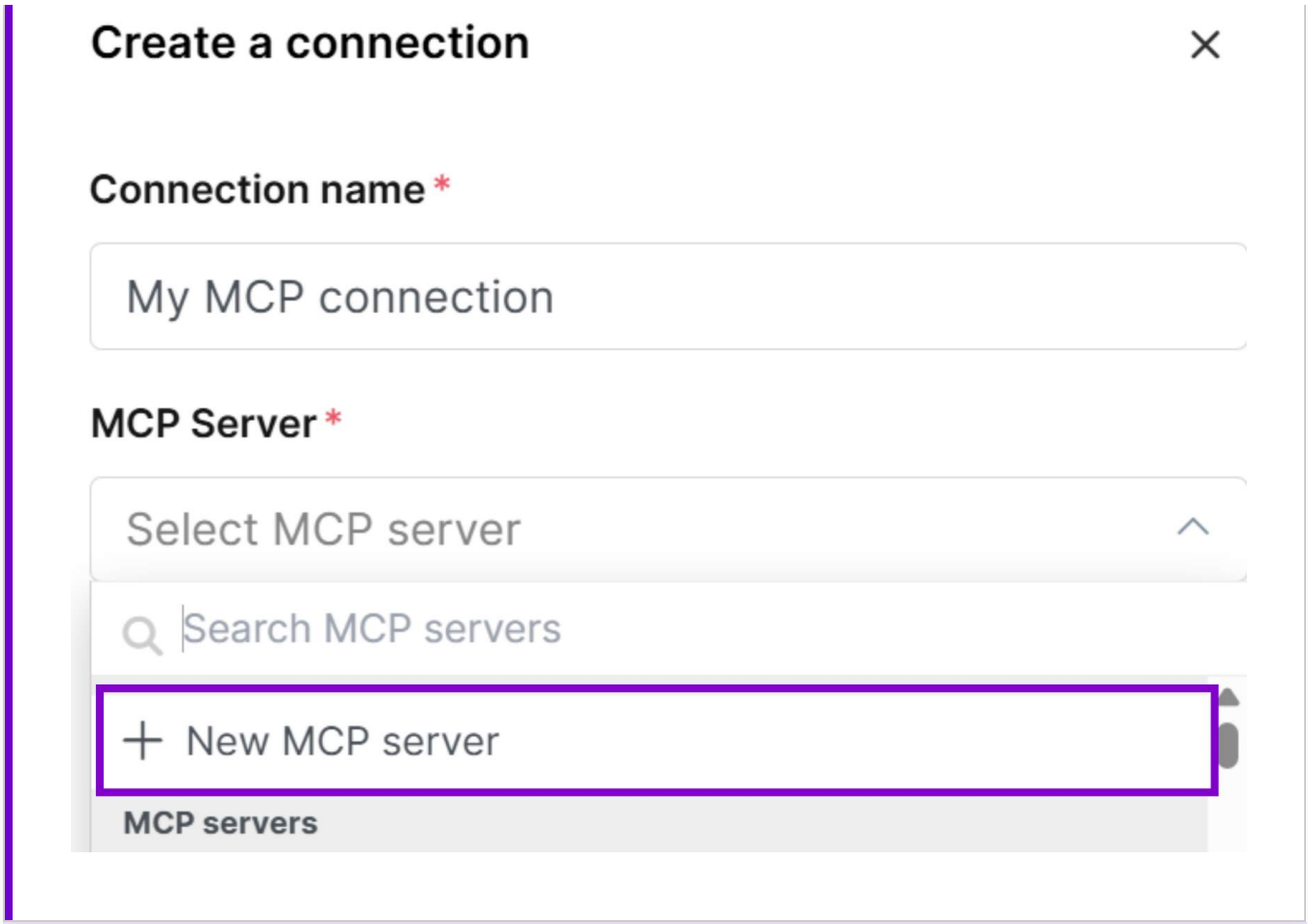
Connect to verified MCP server

Select a server from Make's verified list. Make has already configured the URL and connection details, so you just need to authenticate and start using it.



Connect to a server that isn't in the list

If your server isn't in the verified list, you can connect to it by providing its URL. Select **+ New MCP server**, enter the URL, and complete the authentication.


Create a connection
Connection name *
My MCP connection
MCP Server *
Select MCP server
Search MCP servers
New MCP server
MCP servers

Tool settings

Tool Name *

Refresh | Map

Asana create task

Arguments

name *

Your agent will auto-fill this field | Add details

- [x] Let AI Agent decide

Name of the task.

project_id

- [ ] Let AI Agent decide

Project GID for task creation. Required if not using parent or workspace+assignee.

workspace

- [ ] Let AI Agent decide

Workspace GID where task will be created. Required when using assignee without project_id.

parent

Cancel | Save

After you've created the connection, select the tool you want to run and fill in the required information that the tool needs.

> **Note that you can set certain parameters to Let the AI agent decide. The module then uses whatever values the AI agent provides based on the current task.**

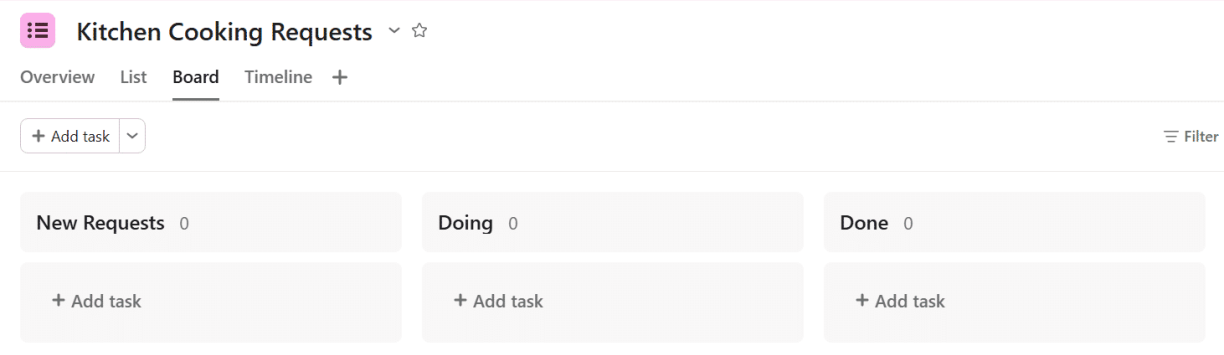
Continue to 2.3.4 See it in action

2.3.4 See it in action

Here's an example of using MCP tools in your AI agents.

Build an AI Agent that receives cooking requests and creates tasks in Asana to manage your kitchen operations.

The kitchen manager plans all kitchen work in an **Asana project**.

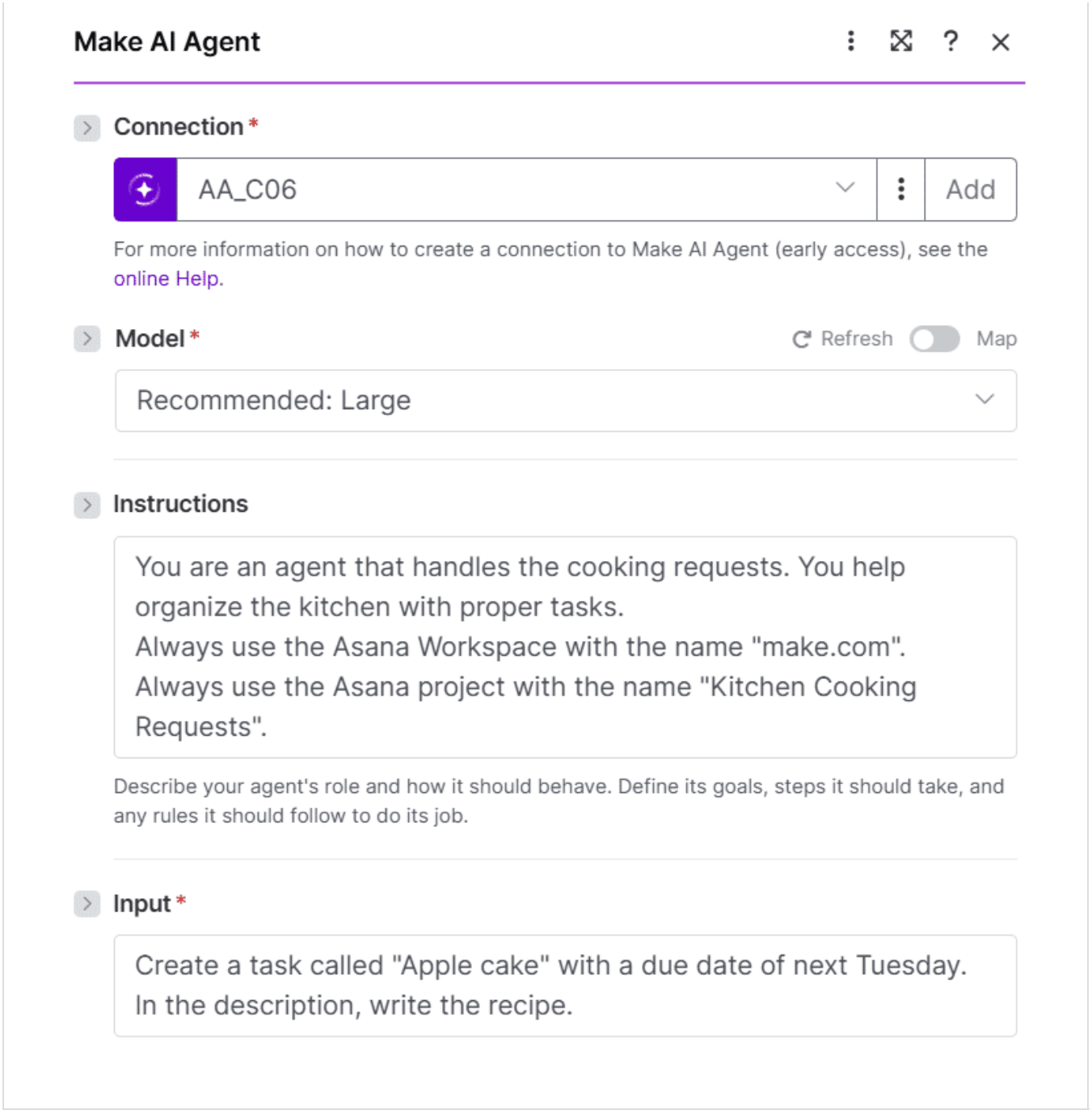


It stores all tasks related to cooking assignments.

Let's have a look at how to set it up and see it working.

CREATE AI AGENT

Create an AI agent and set it up.



ADD THE FIRST MCP TOOL

Hover over the **+** button of the **Run an agent** module and select **Add tool**. Then add the **MCP Client> Call a tool** module. Enter the tool name and description. Then connect to the Asana MCP server by selecting your existing connection. Select the **Asana list workspaces** tool and configure it.

ADD THE OTHER MCP TOOL

Repeat the process to add the remaining tools: **Asana get projects** and **Asana create task**. Remember to choose **Let the agent decide** for fields the agent will provide. You can choose only the field you want your AI agent to provide.

USE THE AI AGENT

Use the chat to ask the AI agent to create a new task in Asana and see that it uses the MCP tools to complete this task.

Great! You've now seen how to add MCP tools to your AI agent and how it uses them to complete tasks. In this example, you had a simple, straightforward task, that's why you used MCP tools.

Continue to 2.4: MCP in Make scenarios

2.4 MCP in Make scenarios

You can use the Make MCP client within your scenarios by adding the MCP Client> Execute an action with AI module.

When you connect to an MCP server with this module, all its tools become available to the AI. You can then select which ones your AI agent can access. The AI analyzes your request and automatically selects the right tools to complete the task.

Here's how it works:

Step 1

Create a connection to your MCP server

Step 2

Select which tools from that server the AI can access

Step 3

Describe what you want to accomplish in plain language

Step 4

The AI figures out which tools to use, in what order, and with what parameters

Step 5

The AI executes the tools and returns the results

This module is what you'll focus on for the rest of the unit. You'll see it in action soon.

Continue to 2.4.1: When to use it

2.4.1 When to use it

When should you use Execute an action with AI versus an AI agent?

Both let you describe a task and have AI select the right tools to complete it. The difference is the complexity of your task and how many services you need.

Execute an action with AI

It works with a single MCP server

AI agents

It is built for complex tasks across multiple

It works with a single MCP server.

Use it when you want the AI to perform actions using tools from one server. The AI reads your task description, picks the right tools from that server, and executes them in the right order.

If you want to get all high-priority Asana tasks and create a summary, use the Execute an action with AI module

It is built for complex tasks across multiple services.

They can use tools from different MCP servers and Make modules at the same time.

If your task involves getting Asana data, creating a PDF, and sending an email, use the AI Agent to handle all these steps across multiple applications.

Continue to 2.4.2: Real-life example

2.4.2 Real-life example

Let's have a look at a real-life example.

👔 Client meeting preparation scenario

🎯 Objective

Build a scenario that automatically prepares briefing documents before client meetings. The scenario gathers information from

before client meetings. The scenario gathers information from your CRM and generates a comprehensive meeting brief with relevant client data and talking points.

Build a scenario with:

- **Calendar** module to detect upcoming meetings and extract client names
- **Execute an action with AI** module connected to your CRM's MCP server (with access to tools like get_account, get_deals, get_contacts, get_activities, update_account)
- **Email** module to deliver the briefing document

The AI automatically decides which CRM tools to call based on

You have a meeting with Acme Corp at 2 PM. At noon, the scenario detects this meeting and sends the client name to **Execute an action with AI** with the task: *Prepare a meeting brief for Acme Corp including account status, active deals, recent*

activities, and key contacts. If any opportunity value exceeds $100K, set the account priority level to High.

The AI calls multiple tools from the CRM MCP server:

- **get_account**: finds company details
- **get_deals**: discovers $150K opportunity
- **update_account**: sets account to High priority since deal exceeds $100K
- **get_activities**: sees last contact was 2 weeks ago
- **get_contacts**: identifies decision-maker

Then it generates a brief with this information.

You receive an email: *Meeting Brief: Acme Corp - $150K deal in final stage, decision-maker is Jane Smith (CFO), last contact 2 weeks ago. Recommended: Follow up on pricing proposal and confirm timeline*.

💜 Advantage of using Make

- The **Execute an action with AI** module automatically determines which CRM tools to call. You don't need to map out every possible situation manually.

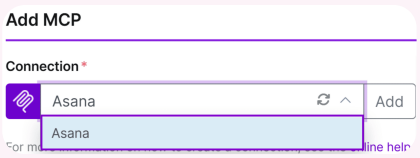
Continue to 2.4.3: How to use it

2.4.3 How to use it

To use the Make MCP client in your scenario, you first need to add the Execute an action with AI module.

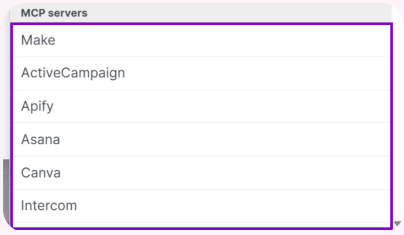
Next, select the MCP server you want to connect to and set up the connection.

You have the same options as before:



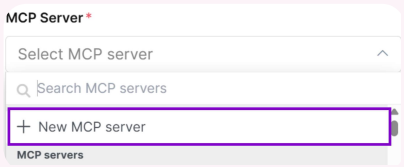
Existing connection

Select a connection you have previously created.



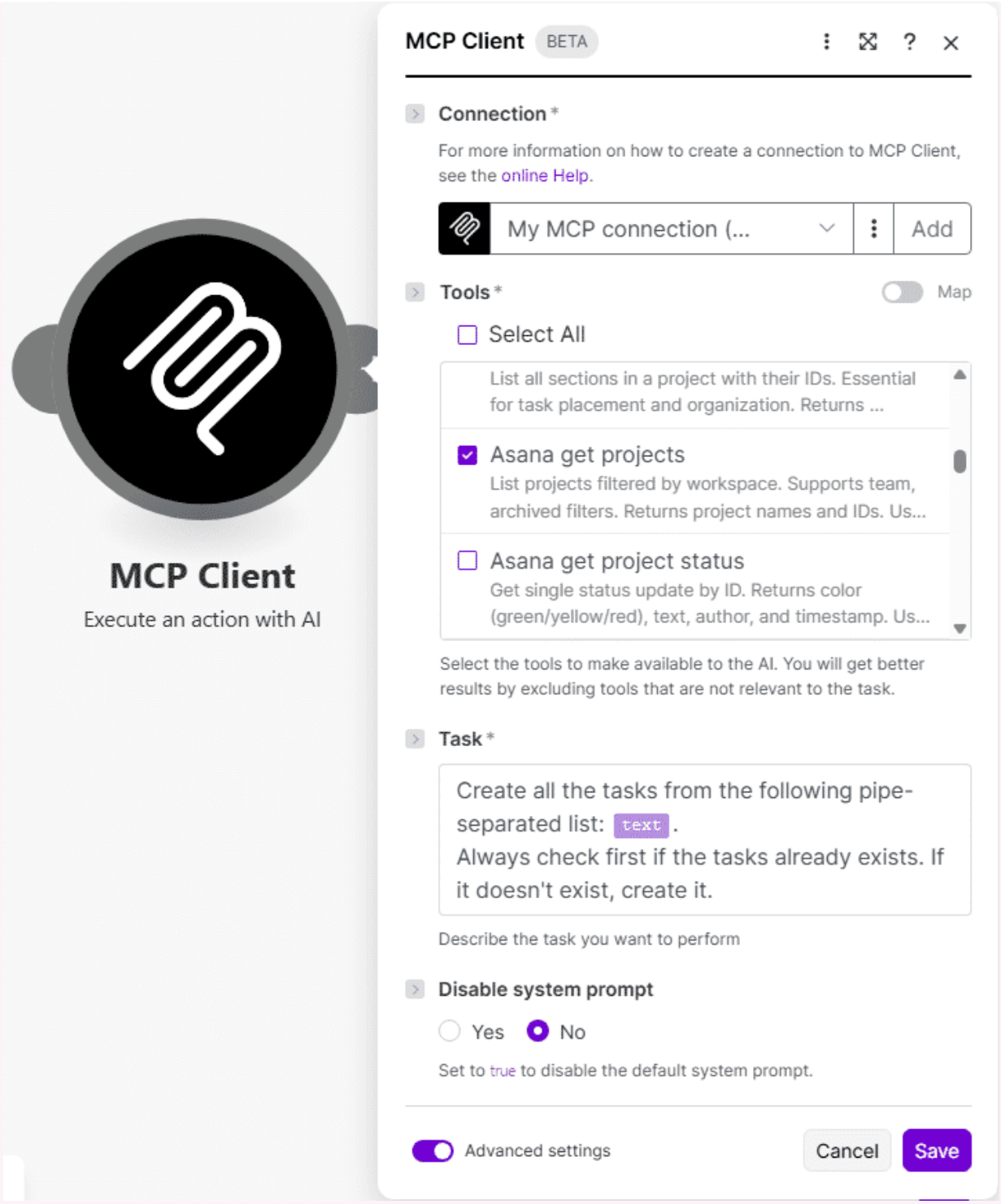
Verified MCP server

Select one of the MCP servers verified by Make and authenticate to create a connection.



Add a new server

Provide the URL to connect to a server not present in the Make verified MCP server list.



Once you've connected to the MCP server, select which tools you want the AI to access and use in your scenario.

Then specify what task you want to accomplish. When you run the scenario, the AI will select the tools it needs.

Let's see how this works in practice.

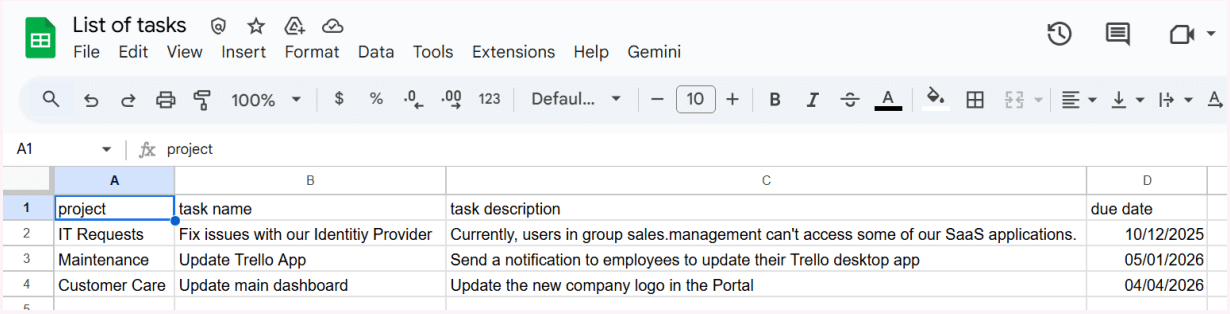
Continue to 2.4.4: See it in action

2.4.4 See it in action

Here's an example of using MCP tools in your scenarios.

Build a scenario that reads a task list and creates only new, non-duplicate tasks in Asana.

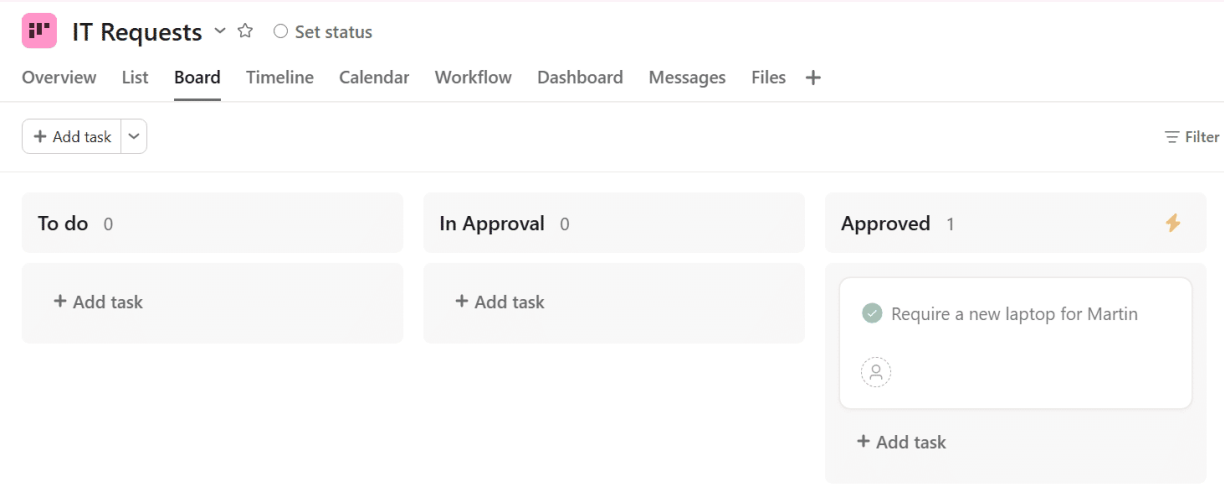
A project manager uses the following tools to manage their work:



	A	B	C	D
1	project	task name	task description	due date
2	IT Requests	Fix issues with our Identitiy Provider	Currently, users in group sales.management can't access some of our SaaS applications.	10/12/2025
3	Maintenance	Update Trello App	Send a notification to employees to update their Trello desktop app	05/01/2026
4	Customer Care	Update main dashboard	Update the new company logo in the Portal	04/04/2026

A Google spreadsheet where different teams add their task requests.

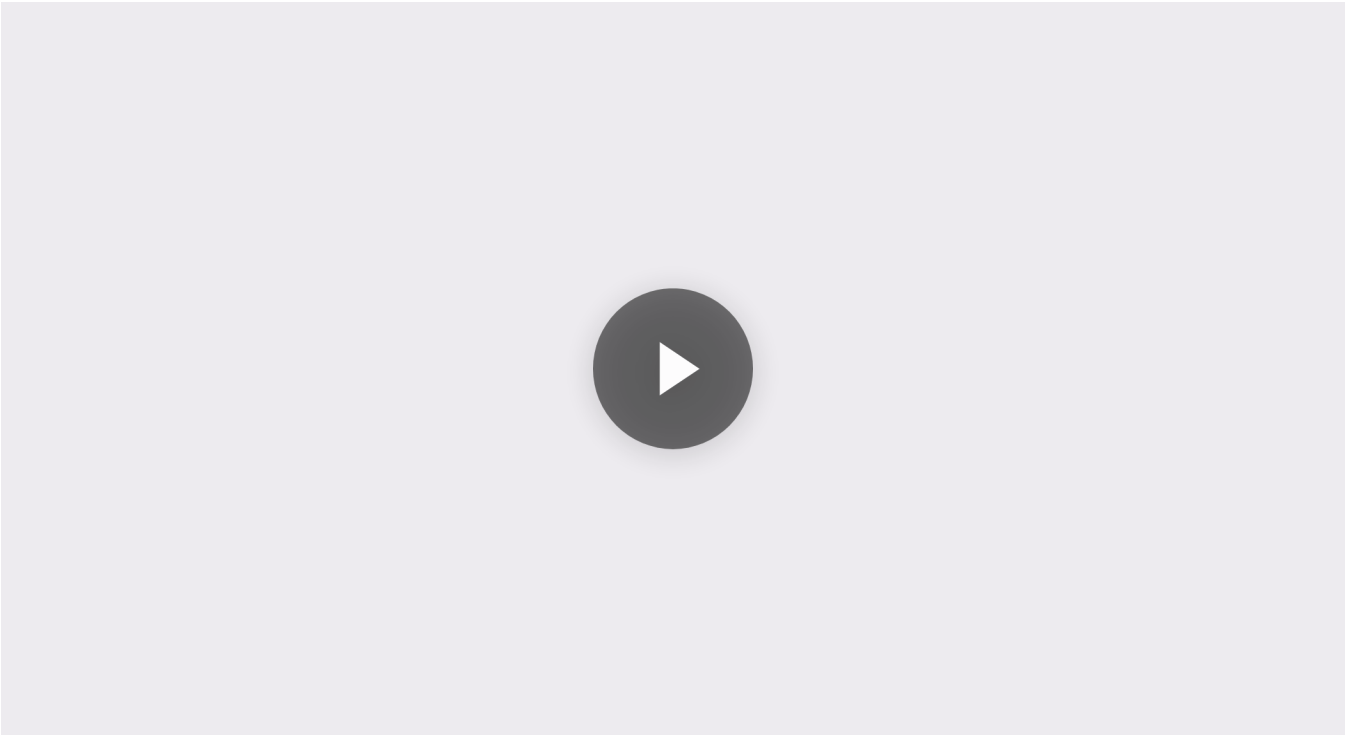
Asana projects to manage the different tasks.



They build a Make scenario to transfer and manage these tasks in Asana.

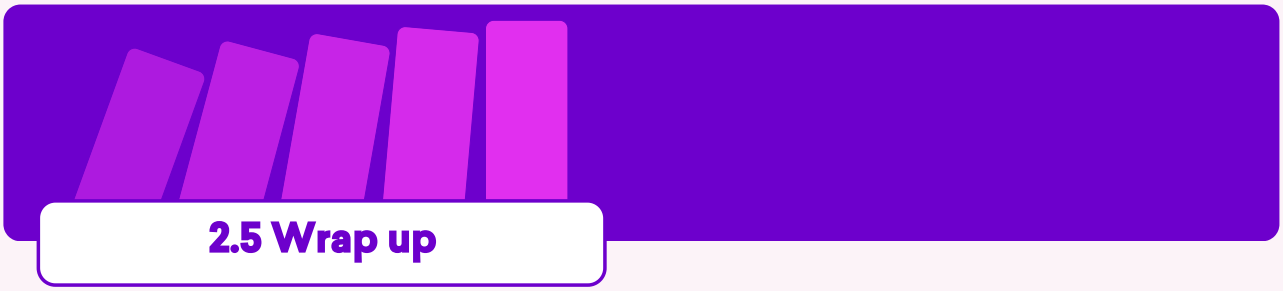
The scenario retrieves new tasks from the Google Sheet and combines them into a single list. Then uses the Asana MCP server tools (**get_projects**, **get_tasks**, **create_tasks**) to check if each task already exists, if not, it creates the task in the corresponding project.

Let's see it in action.



Great! You've learned how to use the Make MCP client in scenarios. Now you're ready to use it in your own projects.

Continue to complete this unit



2.5 Wrap up

1

The Make MCP client lets you **connect to MCP servers and use their tools in your AI agents and scenarios**. Instead of creating the connections or setting up the calls yourself, you can easily access outside applications and tools that aren't already in Make. Once you connect to an MCP server, **all its tools are ready to use**.

2

Use the **Make MCP client** for **simple, straightforward tasks**, like creating tasks in a project management tool or fetching customer data.

Use **Make scenarios or modules** instead when **your task is complex, involves sensitive data, requires control over which inputs and outputs the AI Agent sees, or needs steps to execute in a specific order**.

3

You can use the Make MCP client in two places: **with your AI agents or within your Make scenarios**.

For AI agents, you need to use the **MCP Client> Call a tool** module and select which tools your AI agent can access. For scenarios, you can use the **MCP Client> Execute an action** with AI module where you describe what you want to accomplish and the AI automatically picks which tools to use.

Well done! You now know how to use the Make MCP client.

In the next unit, you will learn more about the Make MCP server.

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Mark this task complete to continue to the next unit.