

TASKRAY

• AGENTIC PROJECT MANAGEMENT

TaskRay MCP

The AI-ready way to run projects in TaskRay.
Ask in plain English. Let your AI Assistant
take the action, securely, as you.



TaskRay AI Accelerates Execution

TODAY

The app

Salesforce-native project management, purpose-built for implementation and delivery teams. The execution system of record.

IN PROGRESS

The platform

An MCP server and agent layer over the TaskRay execution system of record.

THE DIRECTION

Agentic Project Management

Humans and AI agents executing side by side, with context, dependencies, and priorities that TaskRay already holds.



Build with TaskRay MCP

Connect your preferred AI and build specialized agents on TaskRay



Buy with TaskRay Agents

Ready-to-execute agents, purpose-built by TaskRay.



Build + Buy

Combine both and match the approach to your needs.

WHAT YOUR TEAM GETS

Fewer surprises. Faster delivery. Better decisions.



Reduce risk

Slipping milestones, blocked tasks, and overloaded resources surface in the tools your team already works in — before the customer notices.



Deliver faster

Status updates, assignments, and new project kickoffs happen in a sentence instead of a spreadsheet and four clicks.



Data-driven results

Every answer comes from live TaskRay data under your Salesforce permissions, so leaders act on what is true today.

Introducing TaskRay MCP

Speaks TaskRay, not raw data

One request returns the whole project tree, plans, milestones, dependencies, in TaskRay's opinionated model, not just Salesforce IDs.

Runs as the signed-in user

Sharing rules, field-level security, and the audit trail apply automatically. Uses your existing Salesforce security model.

Works with major AI assistants

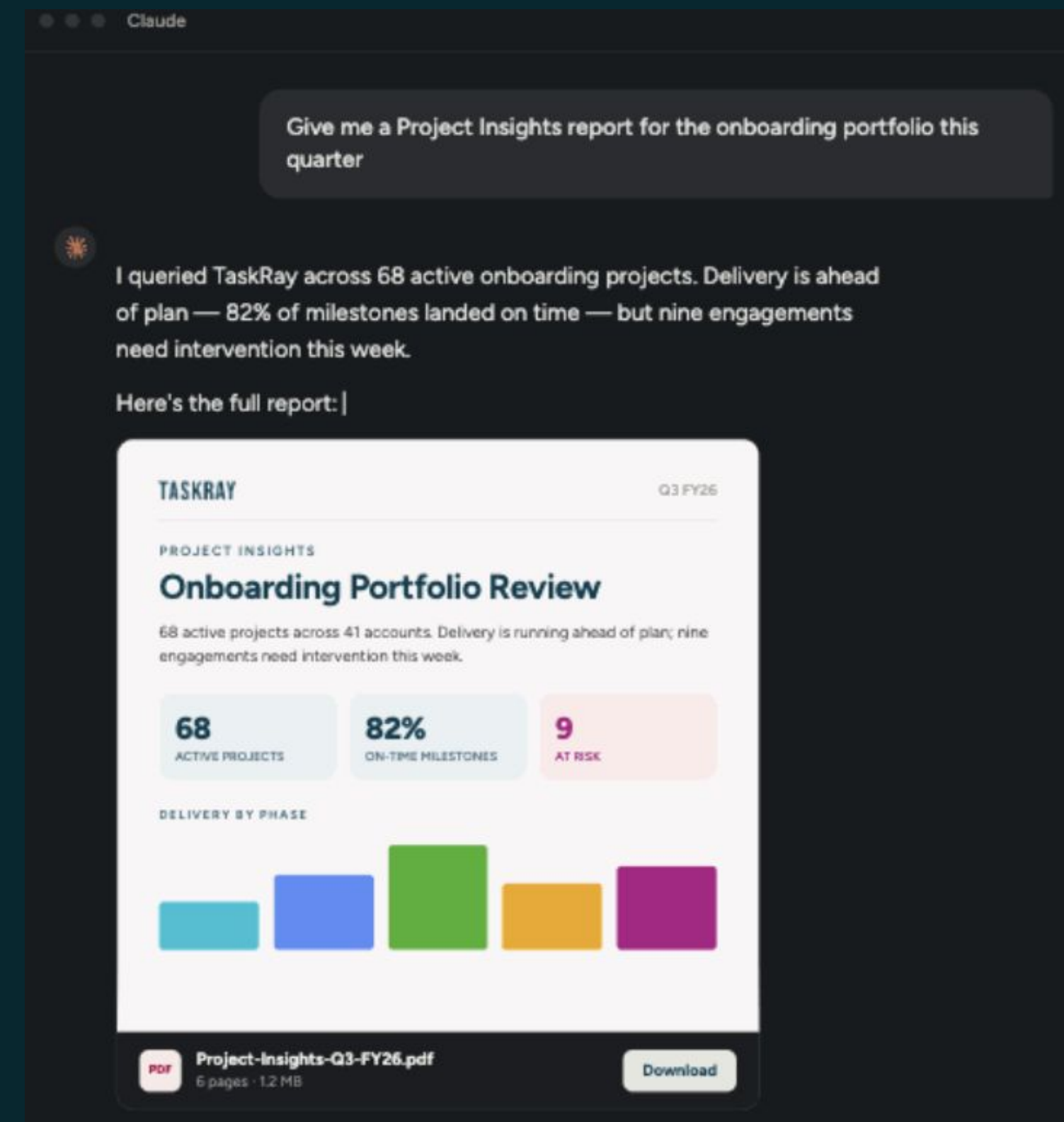
An open standard, so Claude, ChatGPT, Copilot, or Agentforce all connect through the same MCP server.

Takes real action, not just reads

Writes operate through TaskRay's purpose-built tool surface under the user's existing permissions and entitlements.

Foundation for TaskRay Agents

MCP is what feeds the loop between people and AI, the requests, the actions, the outcomes. TaskRay Agents, coming soon, build directly on this foundation.



HOW IT WORKS

Connect the Pieces with TaskRay MCP

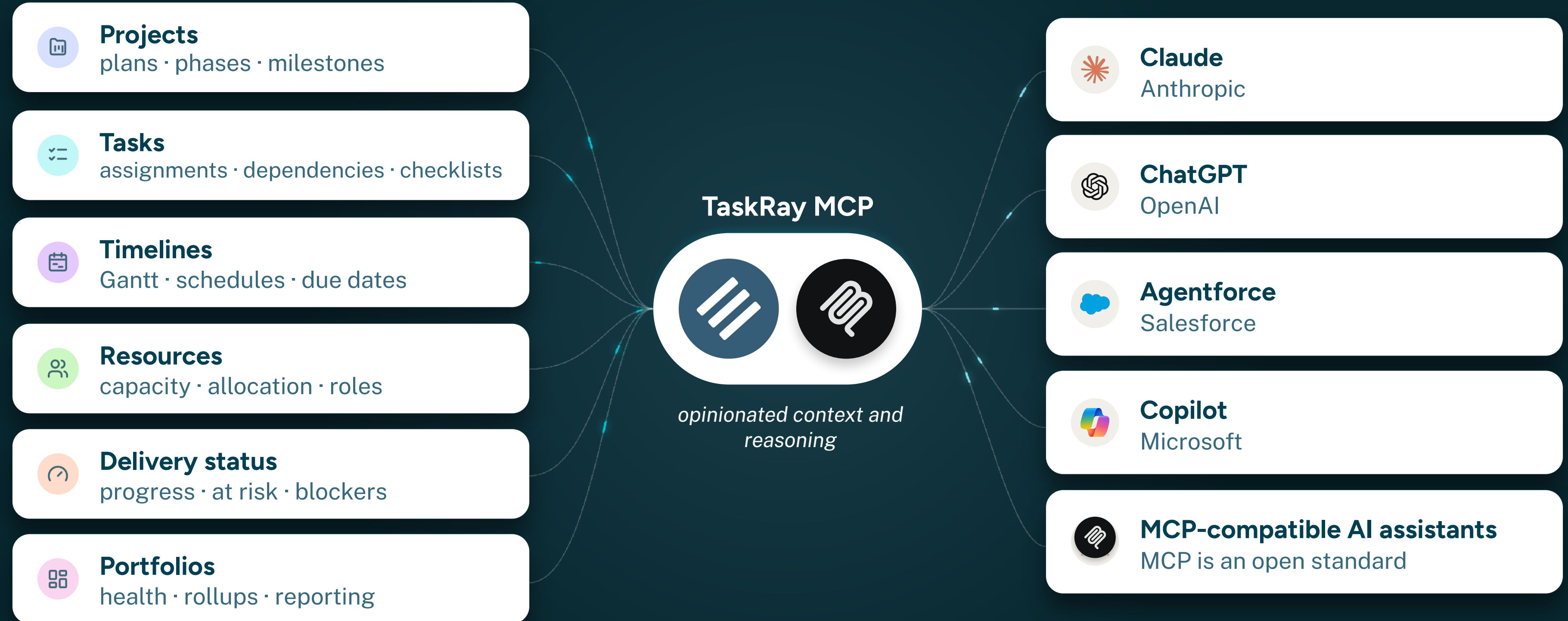
One connector lets supported MCP-capable AI assistants operate TaskRay. This is the foundation everything we build next stands on.



Same security rules

The agent runs as the logged-in user, inheriting your Salesforce permissions, sharing, field-level security, product edition, and audit trail. No back door, no second copy of the data, no new security model to manage.

TaskRay context in, any major AI assistant



Available capabilities vary based on TaskRay edition, licensed feature add-ons, and user permissions.

ASSISTANTS AND SURFACES

TaskRay context, right where you work

AI TOOLS

**Claude**
Anthropic

**ChatGPT**
OpenAI

**Copilot**
Microsoft

**Agentforce**
Salesforce

WHEREVER YOUR AI INTEGRATES | CHAT SURFACES

**Slack**

**Microsoft Teams**

Same permissions, same audit trail, same TaskRay data model, whichever tool is asking and wherever it is asked.



Give the hours back to your customers

FEWER FALSE STARTS

Right the first time

Teams work from the full picture, plan, dependencies and history already analyzed, instead of piecing it together. Less rework, fewer restarts.

FASTER TO VALUE

Revenue realized

Less busy work between the signature and the go-live, so customers reach value, and TaskRay customers reach revenue, faster.

HOURS BACK

Hours reclaimed

Plan upkeep, status chasing and report building stop eating the delivery team's week. The same team carries more projects.

SATISFACTION

Improve CSAT

Reclaimed hours go into strengthening the customer relationship, which is where renewals, references and expansion are won.

The same outcomes TaskRay has always driven, reached with far less human effort.

✱ TASKRAY FOR CLAUDE

Run your project delivery from Claude.

- Project delivery moves forward, faster, from wherever you're already working
- Less manual work, earlier risk detection, more consistent go-lives
- Invest time back into strategic customer relationships and business impact
- Humans and agents work together from TaskRay as the execution system of record
- Agent actions carry the same permissions and audit trail as the person who requested them

✱ Claude

Connected to TaskRay

Which onboarding projects are at risk this week?

✱ Three are slipping: Northwind, Contoso, and Fabrikam. Josh has 12 hours open this week — want me to reassign the blocked tasks and move Northwind's go-live to Oct 14?

Do it, and draft the customer update.

✓ Review & approve · 6 tasks reassigned · go-live moved

Available capabilities vary based on TaskRay edition, licensed feature add-ons, and user permissions.



Run your project delivery from ChatGPT.

- Project delivery moves forward, faster, from wherever you're already working
- Less manual work, earlier risk detection, more consistent go-lives
- Invest time back into strategic customer relationships and business impact
- Humans and agents work together from TaskRay as the execution system of record
- Agent actions carry the same permissions and audit trail as the person who requested them

 ChatGPT

Connected to TaskRay

How is implementation delivery tracking this quarter?

 42 active implementations. 31 on track, 8 at risk, 3 blocked on customer sign-off. The at-risk group shares one cause: solution architect capacity in EMEA.

31
on track

8
at risk

3
blocked

Available capabilities vary based on TaskRay edition, licensed feature add-ons, and user permissions.



Run your project delivery from Copilot.

- Project delivery moves forward, faster, from wherever you're already working
- Less manual work, earlier risk detection, more consistent go-lives
- Invest time back into strategic customer relationships and business impact
- Humans and agents work together from TaskRay as the execution system of record
- Agent actions carry the same permissions and audit trail as the person who requested them

Copilot · Teams Connected to TaskRay

What changed on the Contoso rollout this week?

Two milestones moved, one task is blocked on data migration sign-off, and training is now scheduled for the 12th.

FROM TASKRAY MCP

- Data migration sign-off · blocked 3 days
- Training scheduled · Oct 12

COPILOT SLACK CONNECTOR

Update posted to #contoso-delivery

Available capabilities vary based on TaskRay edition, licensed feature add-ons, and user permissions.



TASKRAY FOR AGENTFORCE

Run your project delivery from **Agentforce**.

- Project delivery moves forward, faster, from wherever you're already working
- Less manual work, earlier risk detection, more consistent go-lives
- Invest time back into strategic customer relationships and business impact
- Humans and agents work together from TaskRay as the execution system of record
- Agent actions carry the same permissions and audit trail as the person who requested them



Agentforce · Account: Northwind



Agentforce updated the Opportunity to Closed Won.
TaskRay MCP created the onboarding project from the Enterprise template and assigned the delivery pod.



FROM TASKRAY MCP



42 tasks created across 5 phases



Kickoff scheduled · owner notified



Logged to the Account timeline

Available capabilities vary based on TaskRay edition, licensed feature add-ons, and user permissions.

DAY TO DAY

TaskRay From Your AI Assistant



Create and manage work, end to end

IN ACTION

“Create a Northwind Onboarding project with task groups for Kickoff, Data Migration, and Training. Add a checklist to Data Migration for field mapping, sample load, and validation, and make Training depend on Data Migration.”



Launch projects from proven templates in seconds

IN ACTION

“Clone the Enterprise Implementation template for Northwind, set the go-live milestone to September 15, and shift every task and dependency back from that date.”



See the whole picture, instantly

IN ACTION

“Give me the full tree for the Northwind rollout, every subproject, task group, and checklist, and flag anything overdue or blocked by an unfinished dependency.”

High-impact actions, like the reschedule example above, require your explicit approval before TaskRay executes them.

THE DIFFERENCE

Generic Salesforce MCP vs. the TaskRay MCP

Generic Salesforce MCP

- Returns raw Salesforce records and IDs
- Leaves it to the agent to interpret your data model
- No built-in concept of a project, milestone, or dependencies
- Does not return TaskRay project structure context

TaskRay MCP

- ✓ Returns the full project tree in TaskRay's opinionated model
- ✓ Hierarchy-aware, one lookup returns what an agent needs
- ✓ Rich, shaped responses: projects, milestones, dependencies
- ✓ Purpose-built TaskRay tools and hierarchy-aware context.
- ✓ Unique to TaskRay, this opinionated surface is the moat

A Salesforce MCP gives an agent raw data. The TaskRay MCP gives an agent everything the TaskRay project model your team already uses, shaped for AI to understand and act on.

BETA PROGRAM

Try TaskRay MCP for Free

Free during Beta

TERM

90-day trial

SEATS

Up to 10 named users

USAGE

5,000 pooled tool calls/month

ELIGIBILITY

Available to Standard + Premium customers

 Use it on real delivery work + give us feedback