

Connect Codex or Claude to AGM Account Intelligence

Upload this PDF to your AI assistant. It provides the complete installation workflow but contains no private credential. The assistant must pause at the access step and request the staff member's single-use AGM code before completing the connection.

Security rule: Request the single-use code only when ready to redeem it. Redeem it immediately, never repeat it, and never display the permanent credential returned by the server.

Connection details

Shared dashboard	https://agm-account-intelligence.jonald911062.chatgpt.site
Connector download	https://agm-account-intelligence.jonald911062.chatgpt.site/mcp/agm-account-intelligence-mcp.zip
Local connector name	agm-account-intelligence
Identity variable	AGM_INTELLIGENCE_API_TOKEN
Access code included here?	No. Obtain a staff-specific single-use code separately from the AGM administrator.

What success looks like

- The connector starts without an authentication error.
- The assistant can call **list_clients** and read the shared production database.
- The assistant can retrieve one client's records across daily, weekly, monthly, quarterly, and yearly timeframes.
- Approved writes appear in the same dashboard used by the rest of the team.

Instructions for the AI assistant

Follow this sequence exactly. If you have local terminal and filesystem tools, perform the work. If you do not, guide the user through each command and verify the reported result before continuing.

- 1 Confirm the computer is Windows and that Node.js and npm are available. If either is missing, explain that Node.js must be installed before continuing.
- 2 Use the **agm-account-intelligence-mcp.zip** file supplied alongside this PDF. If it was not supplied, try the access-controlled URL on page 1. If access is denied, ask the AGM administrator for the ZIP directly; never request that the dashboard be made public.
- 3 Extract it to **%USERPROFILE%\Documents\agm-account-intelligence-mcp**.
- 4 Open PowerShell in that folder and install and build the connector.
- 5 Verify that **dist\server.js** exists.
- 6 Stop before configuration. Ask the user for the staff-specific single-use AGM access code described below.
- 7 Redeem the code exactly once without echoing it, keep the returned API credential in memory, configure the MCP server, restart the client, and run the validation test.

Install and build

```
cd "$env:USERPROFILE\Documents\agm-account-intelligence-mcp"
npm install
npm run build
Test-Path .\dist\server.js
```

Required single-use code pause

Say this to the user: **Setup files are ready. Please provide your staff-specific single-use AGM access code now. It will be redeemed immediately and cannot be used again.**

AGM-XXXXXXXXXXXXXXXXXXXX

POST the code to **/api/access/redeem** with mode **mcp**. The response contains the permanent **apiToken** once. Never print, summarize, quote, log, or return it.

Finalize the connection

Codex - recommended automated command

Redeem the access code and substitute the returned API token in memory. Do not put either value into a user-facing response. The local Codex desktop app, CLI, and IDE extension share the same MCP configuration on that computer.

```
$redeem = Invoke-RestMethod -Method POST `
-Uri https://agm-account-intelligence.jonald911062.chatgpt.site/api/access/redeem `
-ContentType application/json `
-Body (@{code='SINGLE_USE_CODE';mode='mcp'} | ConvertTo-Json)
codex mcp add agm-account-intelligence `
--env AGM_INTELLIGENCE_API_URL=https://agm-account-intelligence.jonald911062.chatgpt.site `
--env AGM_INTELLIGENCE_API_TOKEN=$(($redeem.apiToken) `
-- node "$env:USERPROFILE\Documents\agm-account-intelligence-mcp\dist\server.js"
```

Codex - interface method

- 1 Open Settings and select MCP servers.
- 2 Add an STDIO server named **agm-account-intelligence**.
- 3 Use **node** as the command and **%USERPROFILE%\Documents\agm-account-intelligence-mcp\dist\server.js** as the argument.
- 4 Add the two environment variables shown in the command above, using the redeemed API token.
- 5 Save and restart Codex. Use **/mcp** to confirm that the server is connected.

Claude Desktop

Add an MCP server entry that runs **node** with the absolute path to **dist\server.js**. Redeem the single-use code, then set **AGM_INTELLIGENCE_API_URL** and **AGM_INTELLIGENCE_API_TOKEN** in that server's environment. Save and restart Claude Desktop.

Validation prompt

Use AGM Account Intelligence to list the active clients. Then show Better Dog's latest metrics across all available timeframes.

Expected tools

- list_clients
- get_client_metrics
- record_metrics
- compare_periods
- get_performance_summary
- list_targets

If validation fails

- Confirm the connector folder and **dist\server.js** path are correct.
- Confirm the API URL has no trailing path after the hostname.
- If redemption says the code was used, expired, or invalid, request a new code from the AGM administrator.
- Restart Codex or Claude after changing MCP configuration.
- If the permanent API token was exposed, stop and ask the AGM administrator to revoke it and issue a new access code.