

Planoly AI Assistant (MCP) — Setup & Common Workflows

What this is

Planoly's MCP server lets an AI assistant (ChatGPT, Claude, Gemini, and others) work directly inside your Planoly account. Once connected, you can ask it in plain language to:

- Browse your connected social channels and your media library (and organize the library into folders)
- Save media, notes, and link bookmarks to your library
- Create posts — Instagram grid posts, carousels, reels, and stories — and cross-post to TikTok, Facebook, YouTube, Pinterest, LinkedIn, Threads, and X/Twitter
- Schedule, reschedule, and unschedule posts, including at your Instagram “Best Time” slots
- Pull Instagram analytics, see how your posts performed, and generate a shareable report link
- Look up what public Instagram accounts are posting, for inspiration

You authenticate once with your Planoly login; the assistant acts only inside your own workspace and never sees your password. It can't connect or disconnect social channels — that still happens in Planoly.

Set up in the apps

Recommended for most people. No coding required.

ChatGPT (web/desktop)

Requires a paid ChatGPT plan with custom apps/connectors enabled. Custom MCP connectors are a developer feature — you'll acknowledge a risk warning.

- Open Settings → Apps (this is where connectors now live).
- Click Advanced settings → Create app to open the “New App” form.
- Fill in the form — Name: Planoly. Connection: choose Server URL and paste <https://mcp.planoly.com/mcp>. Authentication: OAuth.
- Tick “I understand and want to continue,” then click Create.
- Log in to Planoly and click Allow.
- In a chat, make sure the Planoly app is enabled, then ask: “Using Planoly, list my connected channels.”

Claude (claude.ai, web/desktop)

Requires a paid Claude plan (Pro, Max, Team, or Enterprise). Custom connectors are in beta.

- Go to Settings → Connectors. (These now live under Customize → Connectors — Claude will point you there.)

- Click the + at the top of the Connectors panel, then Add custom connector.
- Enter — Name: Planoly. Remote MCP server URL: <https://mcp.planoly.com/mcp>. Leave the optional OAuth Client ID/Secret blank unless we give you values.
- Keep Individual sign-in selected and click Add.
- Log in to Planoly and click Allow.
- Ask: “Using Planoly, list my workspaces.”

Set up in command-line tools

For developers comfortable with a terminal. The Planoly MCP server address is <https://mcp.planoly.com/mcp>.

Claude Code

One command:

```
claude mcp add --transport http planoly https://mcp.planoly.com/mcp
```

Or add it to a project `.mcp.json`:

```
{ "mcpServers": { "planoly": { "type": "http", "url":  
  "https://mcp.planoly.com/mcp" } } }
```

Then run `/mcp`, select planoly, choose Authenticate, log in to Planoly, and click Allow. Verify with: “List my Planoly workspaces.”

Gemini CLI

One command:

```
gemini mcp add planoly https://mcp.planoly.com/mcp --transport http
```

Or edit `~/.gemini/settings.json`:

```
{ "mcpServers": { "planoly": { "httpUrl":  
  "https://mcp.planoly.com/mcp" } } }
```

Start gemini, run `/mcp` to check status and authenticate, then verify with: “Use Planoly to list my workspaces.” (Google is consolidating its CLI tooling — confirm the current command against the latest Gemini CLI docs.)

Tips for good results

- Name your workspace if you manage more than one (“in my Acme workspace...”).
- Drafts vs. scheduled. Ask for “drafts” to stage content, or give a time to schedule. The assistant checks each post against the platform’s rules before scheduling, so you get a fixable message instead of a post that fails to publish.
- Aspect ratios matter for auto-publish. Instagram grid posts accept ~4:5 to 1.91:1; reels and stories are vertical. Out-of-range media is flagged when you schedule.
- You confirm the risky steps. The assistant tells you before it publishes, posts, or deletes — especially deleting a folder, which removes everything inside it.

Common workflows you can do

1) Weekly “what’s working” inspiration digest

Have the assistant check public Instagram accounts, summarize what’s performing (formats, hooks, cadence), and turn it into ideas saved in your library.

- Look at the latest posts from @competitor1, @competitor2, and @competitor3. Tell me what themes and formats are working for them, then draft 5 caption ideas in that style and save them as notes in a new media-library folder called “Inspiration — this week.”

To run this on a recurring basis, use your AI client’s own scheduling — for example a ChatGPT scheduled task or a Claude scheduled task — set to send this prompt weekly. Planoly performs the actions each time; the schedule lives in your assistant.

2) Canva → Planoly → schedule

Connect the Canva MCP too, and the assistant can take a design all the way to a scheduled Planoly post — no manual export/upload.

- Find my Canva design called “Summer Launch,” export it, add it to my Planoly media library, and create an Instagram grid post with a caption. Save it as a draft.
- Take these three Canva designs, import them to Planoly, and schedule them as Instagram posts for the next three weekdays at 9am.

3) Batch-create, schedule, and unschedule — fast

- Take all the images in my “Q3 Campaign” media-library folder and create an Instagram grid post for each, with a short on-brand caption. Leave them as drafts.
- Schedule my 10 draft Instagram posts one per weekday at 9am starting next Monday. Skip any that don’t meet Instagram’s requirements and tell me which.
- Unschedule everything planned for this Friday and move it back to drafts.

4) Review performance and share a report

- Show me how my Instagram account did over the last 30 days, and which of my published posts performed best. Then generate a shareable report link I can send to my team.

5) Repurpose a blog post or article for a channel

Give the assistant a URL — a blog post, article, or landing page — and ask it to turn that into a post written for a specific channel’s style and length. The assistant reads the page with its own web browsing, then drafts and saves a channel-native post in Planoly.

- Read <https://www.example.com/blog/<article>> and write a LinkedIn post with its key takeaway in a professional tone. Save it as a draft on my LinkedIn channel.
- Take that same article and turn it into a punchy Instagram carousel caption instead.

Tip: the assistant pulls the article text itself; for the image, point it at one you’ve uploaded, a Canva design, or one it generates — it can’t scrape images from arbitrary sites.

Troubleshooting

- “I don’t see Planoly’s tools.” Make sure you finished the authentication step (the browser “Allow”). In Claude Code / Gemini CLI, re-run /mcp to re-authenticate.
- “It says I need to upgrade.” The feature is on a paid Planoly plan — use the upgrade link the assistant provides.
- “It won’t schedule my post.” The media usually doesn’t meet the platform’s rules (aspect ratio, length, file size) — the assistant tells you what to fix.
- “I’m on the consumer Gemini app and can’t add it.” That’s expected — use Gemini Enterprise or the Gemini CLI.
- “Connect a new social channel.” Channel connections are managed in Planoly directly, not through the assistant.
- “It’s still not working.” Some issues may be on our side — contact Planoly Support and tell us what you tried.

Appendix — Tools the assistant uses

You don’t call these directly — just ask in plain language. This is what’s under the hood, grouped by capability.

Workspaces & channels

- `list_workspaces` — the Planoly workspaces you can act in.
- `list_channels` — your connected social channels and their status.

Media library

- `list_media_library` — browse media, notes, links, and folders (with thumbnails); filter by type and folder.
- `create_media_library_folder` — create a folder to organize items.
- `create_media_library_item` — save media (single or carousel), a note, or a link bookmark.
- `update_media_library_item` — rename a folder, or edit an item’s title / description / link / assets.
- `delete_media_library_item` — remove an item or folder (folders delete their contents too).

Bringing in media

- `create_asset_from_url` — import an image/video from an allowed URL (e.g. a Canva export).
- `request_asset_upload` / `confirm_asset_upload` — upload a local file.

Creating & editing posts

- `create_post` — one post across one or many channels, including Instagram grid/carousel/reel/story (with tags, cover, collaborators, first comment).
- `update_post` — change a post’s caption, media, or auto-publish setting.

Scheduling

- `set_post_group_schedule` — schedule, reschedule, unschedule, or use Instagram Best Time.
- `list_post_groups` — see drafts / scheduled / published posts (with thumbnails).
- `delete_post_group` — delete a post.
- `create_post_report_share_link` — a shareable, read-only report link.

Tagging & inspiration

- `search_instagram_locations` — find location tags.
- `search_instagram_products` — find catalog products to tag.
- `get_instagram_account_posts` — see what a public Instagram account is posting.
- `list_tiktok_trending_sounds` — browse trending TikTok sounds.

Analytics & reporting

- `get_instagram_analytics` — account analytics for a date range.
- `list_post_performance` — how your published posts performed.