Install Microsoft Power BI connector for Creatio

Setup OAuth authorization

To authenticate Power BI to Creatio you need to set up OAuth 2.0. If you are using Creatio Cloud version, please contact Creatio support team to enable Identity Service. Otherwise, if you are using On- premise installation follow this link.

Once Identity service is up and running, please follow these instructions to set up OAuth authorization.

Install connector

To use a Creatio connector, put the Creatio.mez file in the [Documents]\Power BI Desktop\Custom Connectors folder. If the folder doesn't exist, create it.
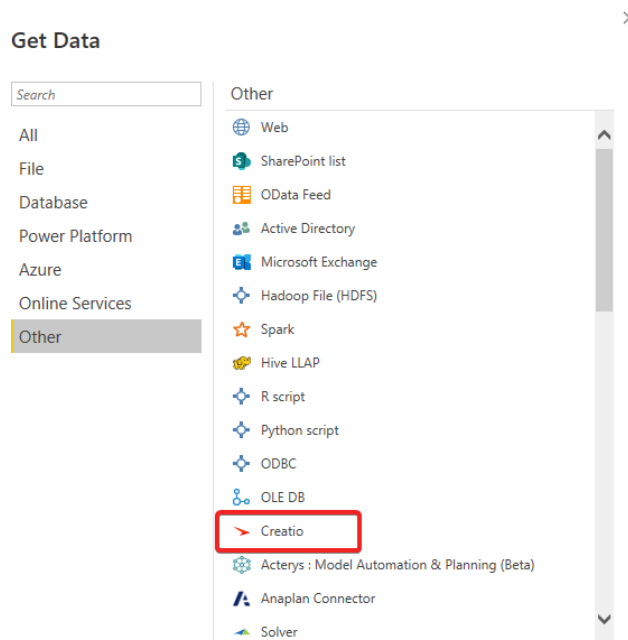
In Power BI Desktop, select File > Options and settings > Options > Security.

Under Data Extensions, select (Not Recommended) Allow any extension to load without validation or warning.
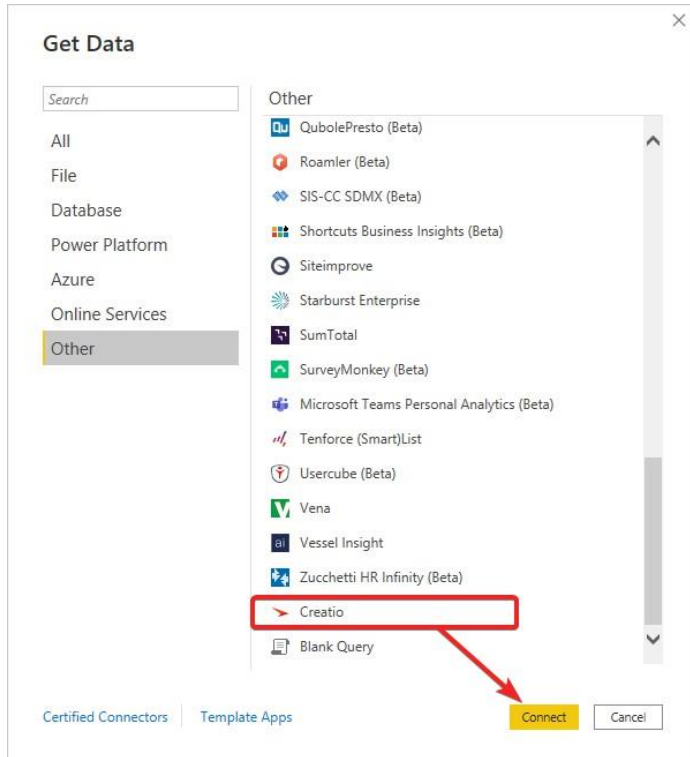
Select OK, and then restart Power BI Desktop.
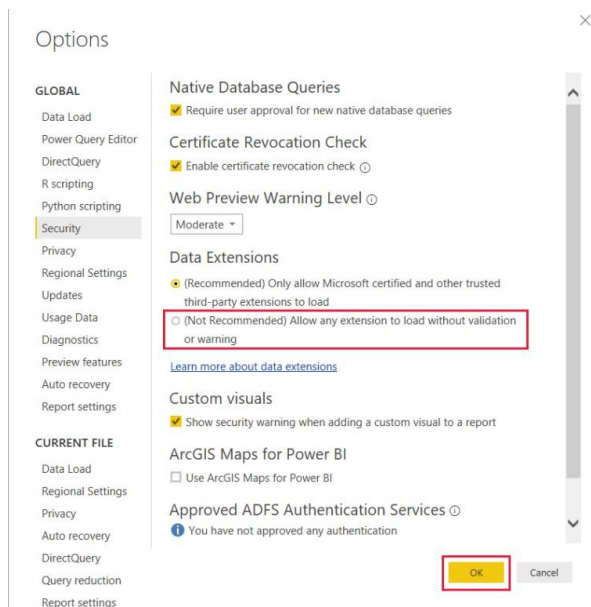
After re-opening Power BI Desktop, you should see a new connector under the Other section.
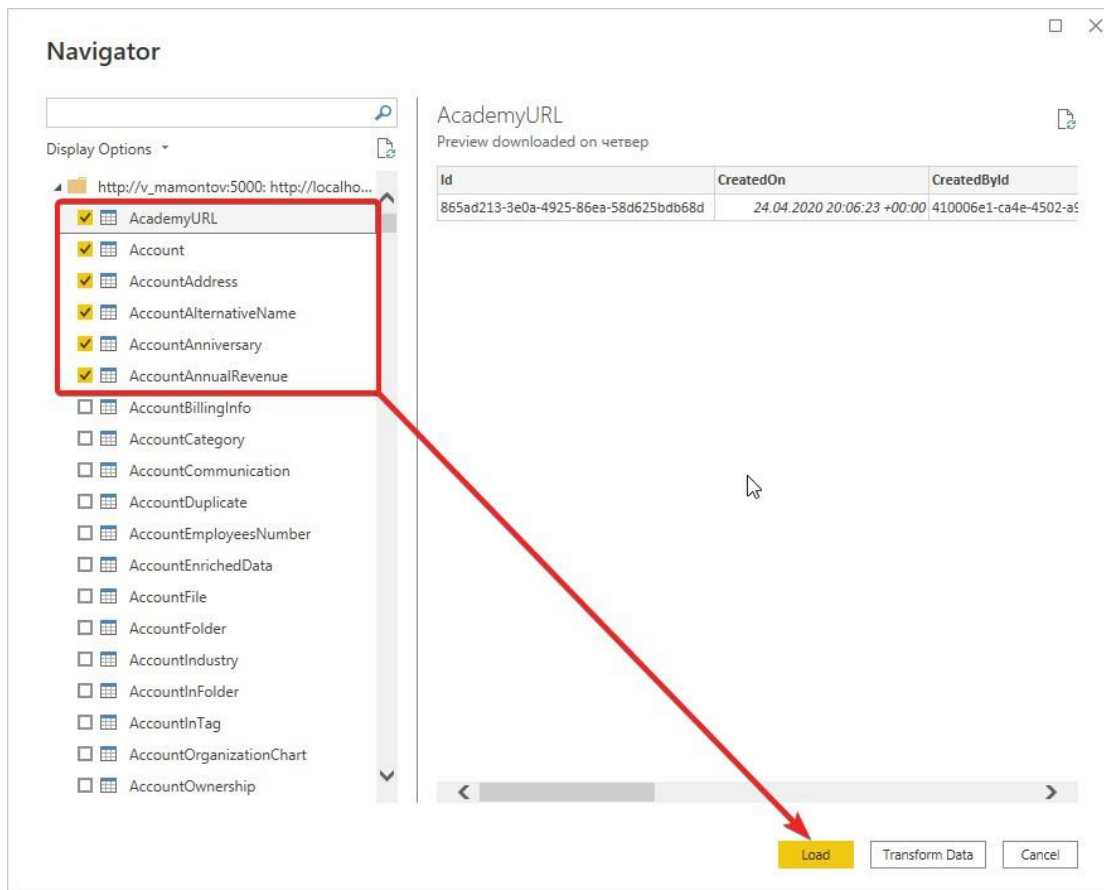
Connect Power BI to Creatio

- URL of Creatio instance (e. g. http://mysite.creatio.com)
- URL of identity service (e. g. http://mysite-is.creatio.com)
- Client id
- Client secret

The result of reading data from Creatio:

To use a previous data source, use Recent sources:
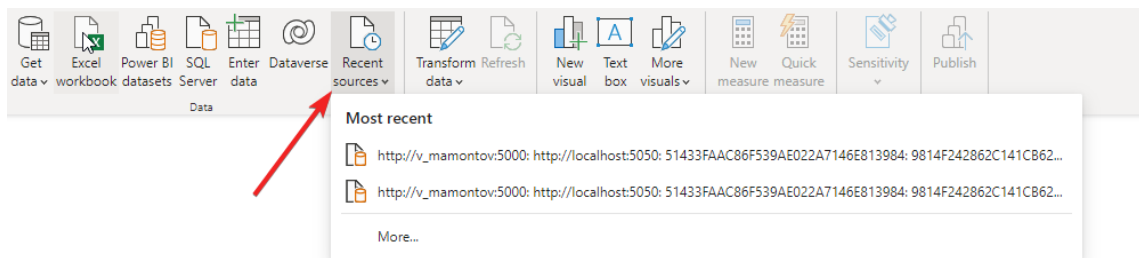
Additional functions

1. To read tables with more than 20,000 rows, use the Creatio.GetBigData function.
   Reading all Contacts:

Result of calling GetBigData function:

2. To read a certain number of records from a table, use the Creatio.GetTopBigData function.
   Reading first 50 Accounts:

Result of calling GetTopBigData function: