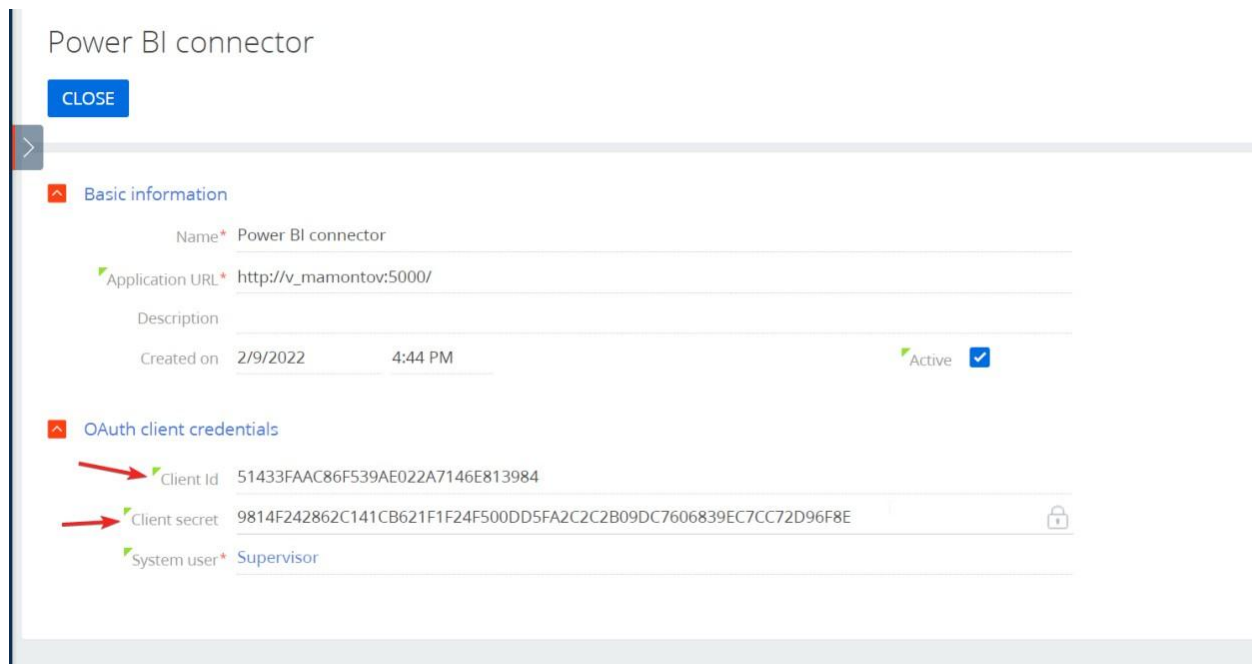# Install Microsoft Power BI connector for Creatio

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.
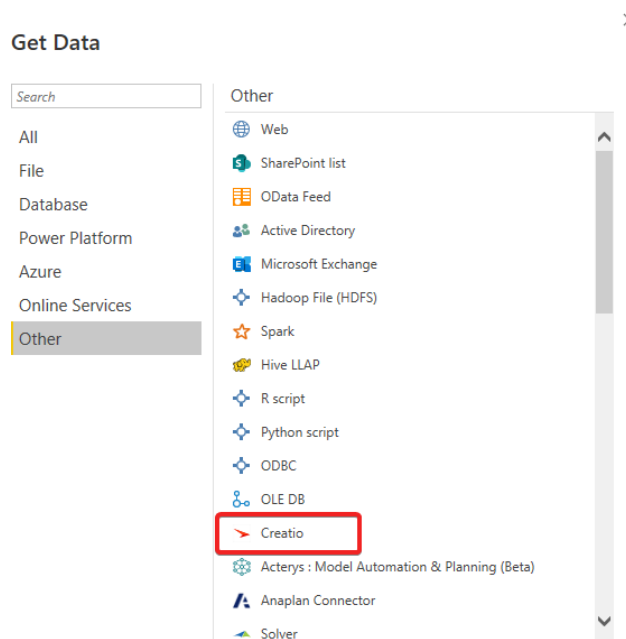
In Power BI Desktop, select File > Options and settings > Options > Security.

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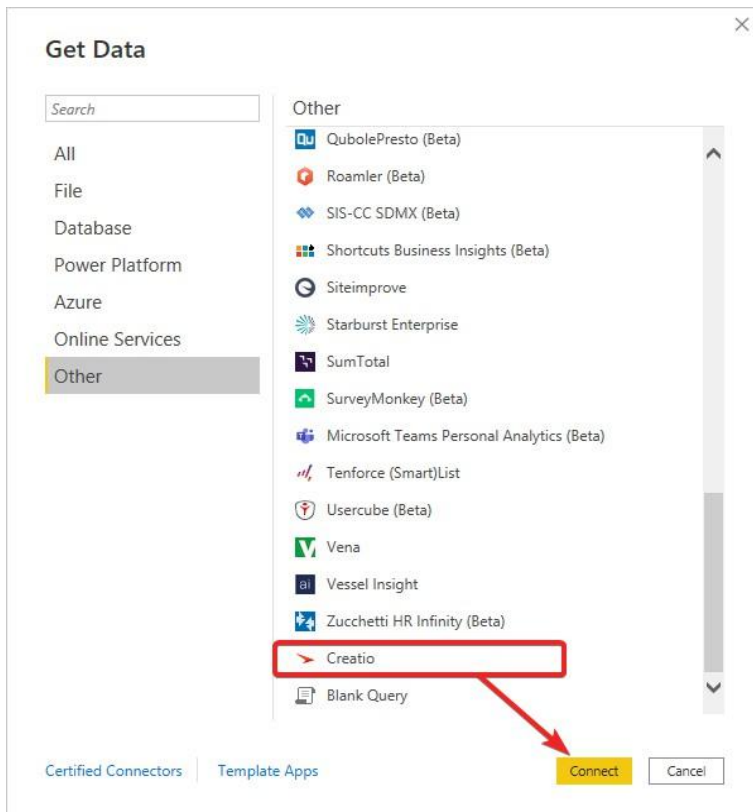
Select OK, and then restart Power BI Desktop.
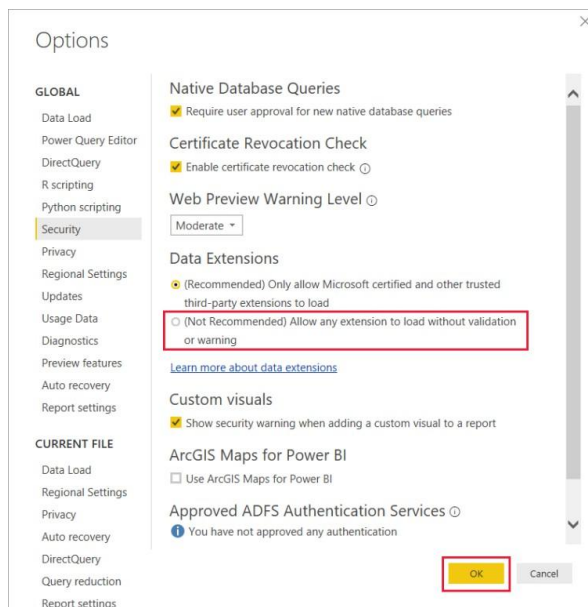
After re-opening Power BI Desktop, you should see a new connector under the Other section.
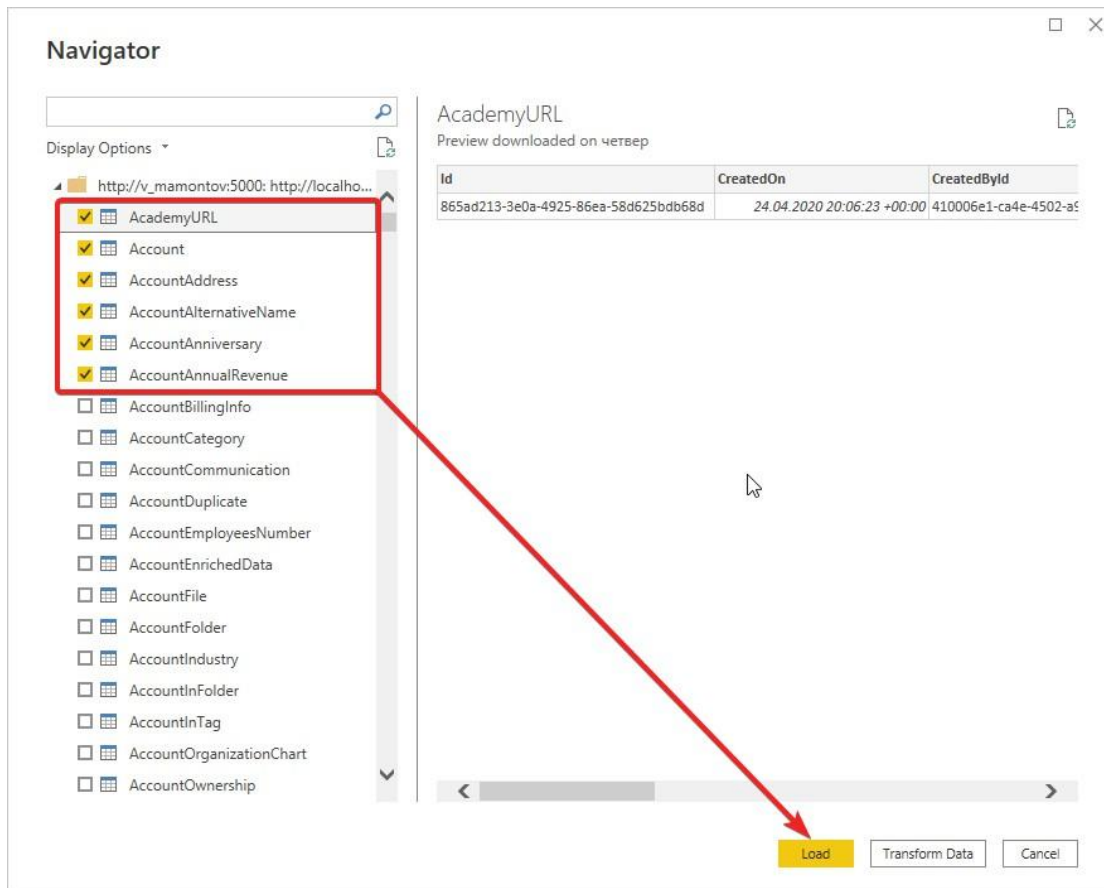
Connect Power BI to Creatio

- 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:
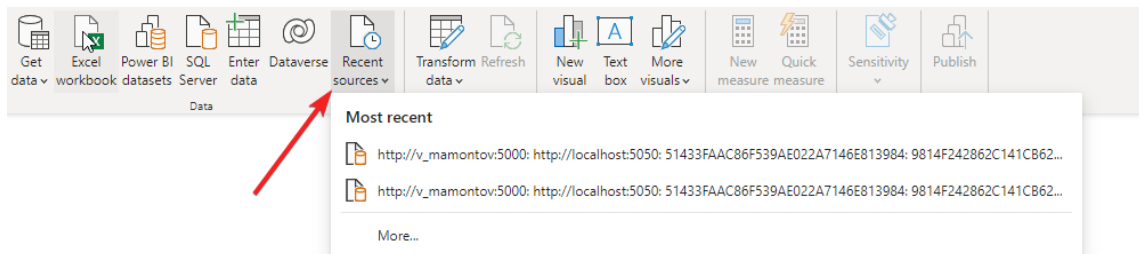
Additional functions

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:

Tips and Recommendations

Reducing data load time

Loading large datasets into Power BI can be slow, especially as more columns and rows are selected. While Creatio sends data quickly through the OData service, Power BI processes it using Power Query, which can be quite heavy and sensitive to internet speed.

To improve performance:

- Select only the fields you truly need for your report.

- Filter data in advance to reduce its volume.

- Avoid applying complex transformations in Power Query.

- Start with a smaller data load, then gradually expand.

A well-prepared, filtered dataset is key to working efficiently with Power BI.

Handling large tables

When connecting large tables like *Account* using the GetData function, Power BI might show an error like:

"*Microsoft Power BI connector for Creatio. Unable to connect to Power BI.*"

This can happen if all columns are selected at once. In cloud environments, this creates a URL that's too long and causes the request to fail. Also, Power BI doesn't support image-type fields, such as the default *Logo* column.

To avoid this:

- Choose only the specific columns needed.

- Exclude image fields from your query.

- Use filters to reduce data size.

- Test your query step-by-step to catch issues early.

This is especially important in cloud setups, where URL length limits apply.

Access to the resource is forbidden

While setting up the connection, you might see this message:

"*Unable to connect. Details: Access to the resource is forbidden.*"

This usually means the user defined in the OAuth settings doesn't have permission to use OData. It often happens when a new technical user is created without proper access rights.

Make sure the user has permission for the system operation called "*CanUseODataService*".

Once granted, the connection should work as expected.

Server error when loading data

A generic 500 error like this:

"*DataSource.Error: Creatio: Request failed: The remote server returned an error: (500)*"

Can appear when table columns have underscores in their codes. OData may interpret underscores as spaces and try to access non-existent fields.

To fix this, update the column codes by removing underscores. This requires the object to be part of an unlocked package, or the changes can be made by deploying a new package version from the development environment. After updating, regenerate the code and recompile the application.