

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.

← Power BI

Close

Add tag

Feed

Attachments

Application details

Application logo



This image is displayed on the consent page when integrating an external application and on the user profile page.

Name *

Power BI

☒ Integration is active ⓘ

☐ Public client ⓘ

Please note

For the applications provided by Creatio, you can find the relevant documentation in the Academy.
By creating an integration with the third-party application, you might grant such an application access to your Data

SETTINGS MONITORING

Application information

Description

Application URL [https://\[redacted\].creatio.com/](https://[redacted].creatio.com/)

Allowed grant types

Select the grant types this integration is allowed to use. Authorization code — the integration acts on behalf of a signed-in user. Client credentials — the integration runs server-to-server as a system user.

☐ On behalf of a user (authorization code)

☒ Server-to-server (client credentials)

Credentials

You can use the client credentials below in your external app to get authorized access to the Creatio API. Do not share your client credentials with others or expose it in the browser or other client-side code.

Client Id

[redacted]

Client secret

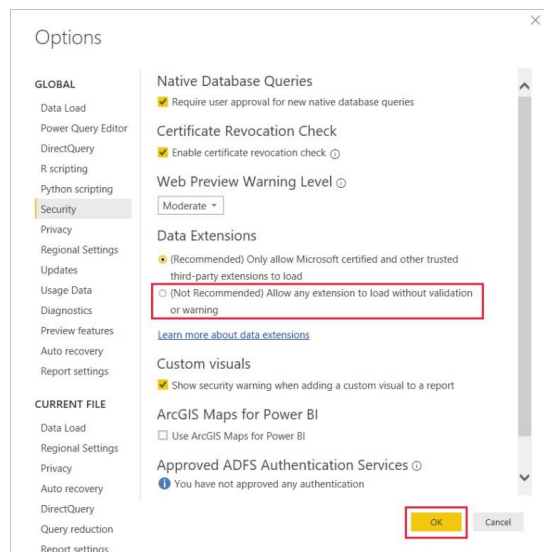
Install connector

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.

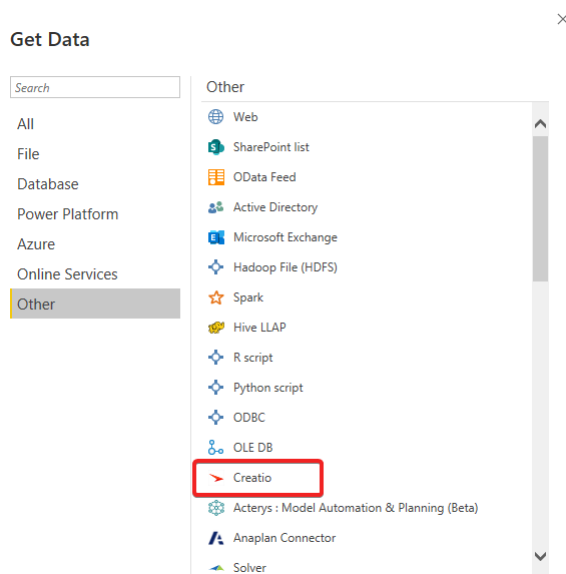
In Power BI Desktop, select File > Options and settings > Options > Security.

Under Data Extensions, select (Not Recommended) Allow any extension to load without validation or warning.

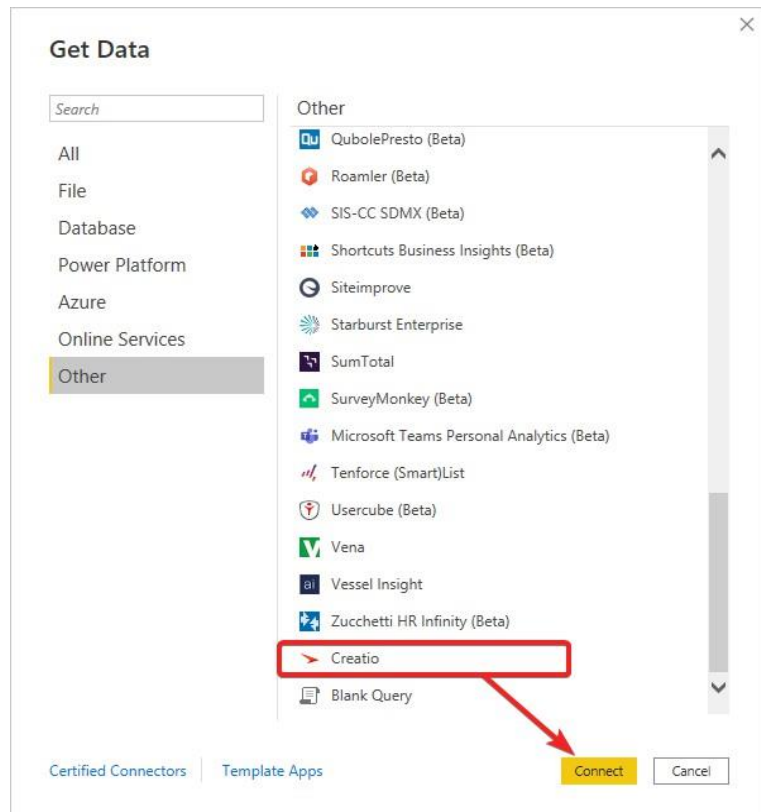
Select OK, and then restart Power BI Desktop.



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:

The screenshot shows the 'From Creatio.GetData' configuration dialog box. It has a title bar with a close button (X). The dialog contains four input fields, each with a label and an example value:

- URL of Creatio instance:
- URL of identity service ①:
- Client id ①:
- Client secret ①:

At the bottom right, there are two buttons: 'OK' (highlighted in yellow) and 'Cancel'.

Navigator

Display Options ▾

https://[redacted].creatio.com: htt...

- ☐ GetBigData
- ☐ GetTopBigData
- Tables [1570]**
 - ☒ AcademyURL
 - ☒ AccessControlWhitelist
 - ☒ Account
 - ☒ AccountAddress
 - ☐ AccountAlternativeName
 - ☐ AccountAnniversary
 - ☐ AccountAnnualRevenue
 - ☐ AccountBillingInfo
 - ☐ AccountCategory
 - ☐ AccountCommunication
 - ☐ AccountCompetitor
 - ☐ AccountDuplicate
 - ☐ AccountEmployeesNumber
 - ☐ AccountEnrichedData
 - ☐ AccountFile
 - ☐ AccountFolder

AccountAddress

Id	CreatedOn	CreatedById
00617ca6-575b-e011-a4c2-00155d043204	05-Sep-16 9:07:43 +00:00	76929f8c-7e15-4c64-
0062b531-965a-e011-a4c2-00155d043204	05-Sep-16 9:07:43 +00:00	76929f8c-7e15-4c64-
02fb4276-f01e-422a-951a-ce93323bac10	05-Sep-16 12:46:14 +00:00	76929f8c-7e15-4c64-
068d5d8a-545b-e011-a4c2-00155d043204	05-Sep-16 9:07:43 +00:00	76929f8c-7e15-4c64-
08fdb4f7-ffd4-416e-b862-a70d86c16e4e	29-Nov-22 15:37:53 +00:00	76929f8c-7e15-4c64-
0c565f90-84d5-4dc6-8464-29a17fca88b1	05-Sep-16 12:46:14 +00:00	76929f8c-7e15-4c64-
1055b524-925a-e011-a4c2-00155d043204	05-Sep-16 7:21:31 +00:00	76929f8c-7e15-4c64-
18ec715a-d25a-e011-a4c2-00155d043204	05-Sep-16 9:07:43 +00:00	76929f8c-7e15-4c64-
1a44b5ae-9a5a-e011-a4c2-00155d043204	05-Sep-16 9:07:42 +00:00	76929f8c-7e15-4c64-
20adaebb-4312-46da-a50d-4d70d4d3dfa1	05-Sep-16 12:46:14 +00:00	76929f8c-7e15-4c64-
26e8bfc3-fc38-41f8-8ba1-229ec5665cb1	05-Sep-16 7:21:31 +00:00	76929f8c-7e15-4c64-
275b5caa-985a-e011-a4c2-00155d043204	05-Sep-16 9:07:43 +00:00	76929f8c-7e15-4c64-
2a362123-9a5a-e011-a4c2-00155d043204	05-Sep-16 9:07:43 +00:00	76929f8c-7e15-4c64-
37acf33f-9f5e-e011-a4c2-00155d043204	05-Sep-16 9:07:42 +00:00	76929f8c-7e15-4c64-
37d57c28-9e5a-e011-a4c2-00155d043204	05-Sep-16 9:07:43 +00:00	76929f8c-7e15-4c64-
3ae83051-945a-e011-a4c2-00155d043204	05-Sep-16 9:07:43 +00:00	76929f8c-7e15-4c64-
3d10f17c-5e5b-e011-a4c2-00155d043204	05-Sep-16 9:07:43 +00:00	76929f8c-7e15-4c64-
44efd7e3-af5a-e011-a4c2-00155d043204	05-Sep-16 9:07:42 +00:00	76929f8c-7e15-4c64-
49f1ef68-d35a-e011-a4c2-00155d043204	05-Sep-16 9:07:42 +00:00	76929f8c-7e15-4c64-
4d765918-585b-e011-a4c2-00155d043204	05-Sep-16 9:07:43 +00:00	76929f8c-7e15-4c64-

The data in the preview has been truncated due to size limits.

Load Transform Data Cancel

To use a previous data source, use Recent sources:

File Home Insert Modeling View Optimize Help

Recent sources

Most recent

- https://[redacted].creatio.com: https://[redacted].creatio.com:

More...

Clipboard: Paste, Copy, Format painter

Data: Get data, Excel workbook catalog, OneLake Server, SQL Enter data, Dataverse

Visuals: New visual, Text box, More visuals

Calculations: New visual calculation, New measure, Quick measure

Sensitivity

Publish

Prep data for Copilot AI

Share

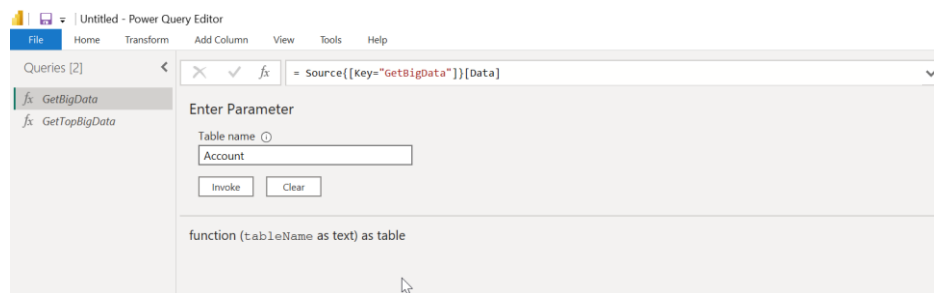
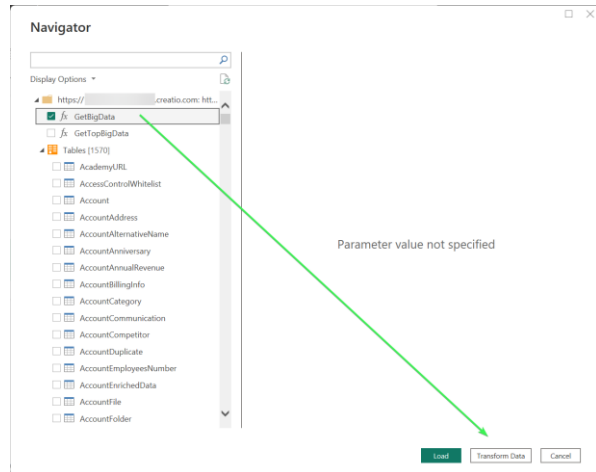
Search

You haven't loaded any data yet. Get data

Additional functions

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

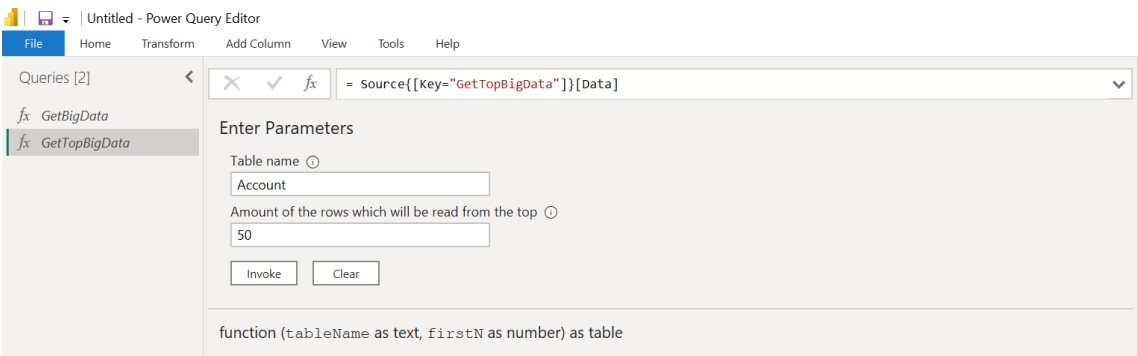
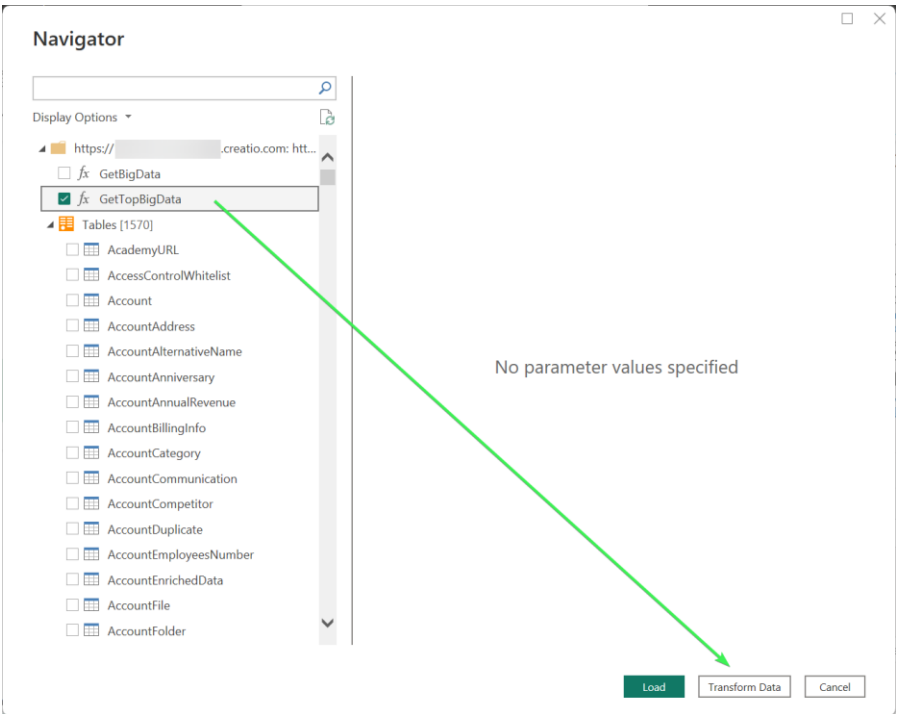
Reading all Contacts:



Result of calling GetBigData function:

ColumnId	ColumnName	ColumnOwnerId	ColumnCreatedOn	ColumnCreatedBy	ColumnModifiedOn	ColumnModifiedBy	ColumnProcessListeners	ColumnDesc	ColumnSalutationType
4100061-c4e-4502-a9ec-e546922d2c00	Supervisor	00000000-0000-0000-0000-000000000000	2020-04-24T20:06:39.554296Z	4100061-c4e-4502-a9ec-e546922d2c00	2020-06-26T15:08:50.567397Z	4100061-c4e-4502-a9ec-e546922d2c00	0	7426Mb3-56e6-df11-971b-001b8	
9c79b38a-be46-4723-8798-63099d594dc	SysPortaConnection	00000000-0000-0000-0000-000000000000	2020-04-24T20:25:08.477015Z	00000000-0000-0000-0000-000000000000	2020-04-24T20:25:08.477015Z	00000000-0000-0000-0000-000000000000	0	00000000-0000-0000-0000-0000-0000	
b19f80d8-2d4f-4c18-b198-091904b08805	User2	4100061-c4e-4502-a9ec-e546922d2c00	2022-02-15T13:19:39.255667Z	4100061-c4e-4502-a9ec-e546922d2c00	2022-02-15T13:19:39.255716Z	4100061-c4e-4502-a9ec-e546922d2c00	0	00000000-0000-0000-0000-0000-0000	
d5e49582-6666-445c-454c-947493381d5	abod1	4100061-c4e-4502-a9ec-e546922d2c00	2022-02-15T13:41:14.125055Z	4100061-c4e-4502-a9ec-e546922d2c00	2022-02-15T13:41:14.125088Z	4100061-c4e-4502-a9ec-e546922d2c00	0	00000000-0000-0000-0000-0000-0000	
f694039-b33e-4985-e90e-629570c93b7b	User	4100061-c4e-4502-a9ec-e546922d2c00	2022-02-15T12:58:27.463418Z	4100061-c4e-4502-a9ec-e546922d2c00	2022-02-15T12:58:27.463421Z	4100061-c4e-4502-a9ec-e546922d2c00	0	00000000-0000-0000-0000-0000-0000	

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



Result of calling GetTopBigData function:

45	1c94d5d9-4872-42b8-8529-694a1966a2...	RealWay	76929f8c-7e15-4c64-bdb0-adc62d383727	2022-05-02T15:22:32Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727
46	ff7e089f-1fe9-4ca9-bc30-2d76ad39d178	Gateway	c38d46fd-e405-491a-a508-01bb9760eccc	2022-05-01T12:14:14Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727
47	7e5c0784-5cb9-4a08-b2b4-a38824122282	Console Solutions	8850d33c-b783-45dc-a86c-5d29f9e7c03a	2022-04-18T11:12:28Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727
48	clae3e40-f96b-1410-1599-00155d043204	Elite Systems	8f9b52f9-b494-4642-8563-25d706f2d5db	2022-04-08T13:57:37Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727
49	23d61e7a-d128-48f5-8335-15e746e741e8	FlashNet Consulting	c38d46fd-e405-491a-a508-01bb9760eccc	2022-02-28T15:34:21Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727
50	e1421cf4-3af8-4bce-ad82-e6aea1fff2c6	Axiom	cad50d15-f28d-49fc-aa79-21615ac35b86	2022-02-24T14:59:31Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727

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.