FollowupCRM

INTEGRATION GUIDE

Connecting Followup CRM to Power BI

A step-by-step guide to loading your Followup CRM project data into Power BI.

1 Ask support to enable Power BI for your account

Contact Followup CRM support to turn on Power BI. Once it's on, your project data syncs automatically to a dedicated database that Power BI can read from. Followup CRM will provide you with these details for the connection:

HOSTNAME	USERNAME	PASSWORD
`powerbi.followupcrm.com`	Company specific	Company specific

2 Download Power BI Desktop

If you don't have it yet, download Power BI Desktop from Microsoft and install it.

3 Connect to your data

1. Open Power BI Desktop.
2. On the Home ribbon, click **Get Data**.
3. Search for and select **MySQL database**, then click **Connect**.
4. In the **Server** field, enter `powerbi.followupcrm.com`.
5. In the **Database** field, enter the database name from support.
6. Click **OK**.
7. When prompted, enter your company's username and password from Followup CRM.
8. Click **Connect**.

4 Select your data table

1. In the Navigator window, expand the database.
2. Select the table named `followupcrm_` followed by your account number. Support can confirm the exact name.
3. Click **Load**.

Your Followup CRM project data will now load into Power BI.

5 Build your reports

Your table includes the following data:

Project details
Name, address, city, state, zip, bid date, contract date, contract amount, base bid, office, contract type, sales status

Team members
Estimator, account manager, take-off person

Contact information
Name, email, phone

Custom fields
Any custom fields your team has set up in Followup CRM

Sales behaviors
Dates and completion status for each behavior

Change orders
Sales status, bid date, contract date and amount for each change order

6 Keep your data up to date (Power BI Service)

If you publish your report to Power BI Service and want it to refresh automatically:

1. Set up an **On-premises data gateway** in Power BI Service. This is required if your database isn't publicly accessible; ask support whether it applies to you.
2. In Power BI Service, open your dataset's **Settings**.
3. Under **Data source credentials**, enter the same connection details from Step 3.
4. Turn on **Scheduled refresh** and pick how often it runs.

Your Followup CRM table updates automatically whenever projects are created, updated or deleted in the CRM, so your reports stay current on every refresh.

Need help?

Contact Followup CRM support to enable your account, get your connection credentials, or confirm your table name.

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