



**D&B Hoovers  
Microsoft Dynamics 365  
Installation Guide**

Version 1.6  
June 3, 2019

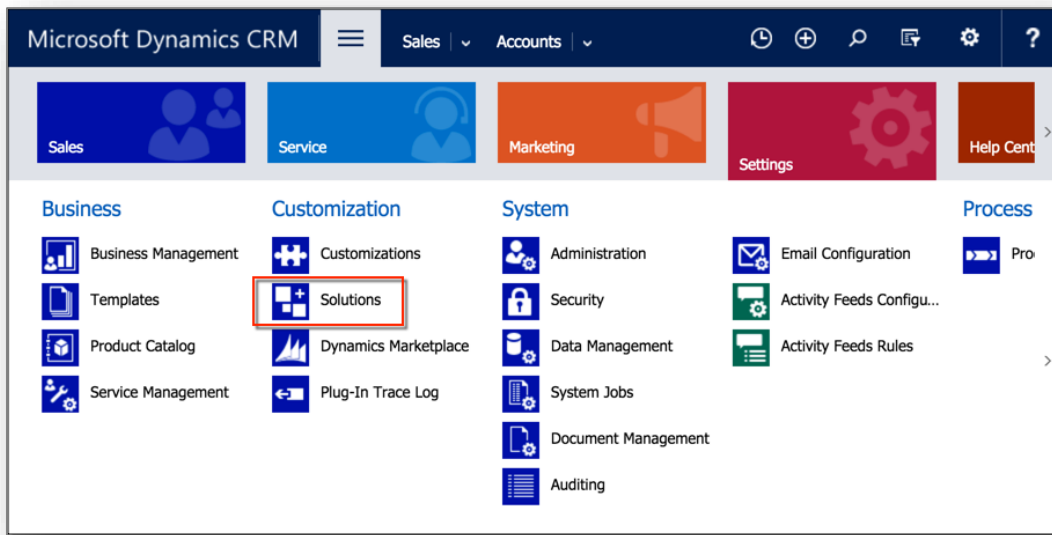
## Installing D&B Hoovers Microsoft Dynamics 365 Package

To install D&B Hoovers in the Dynamics 365 environment, follow these steps:

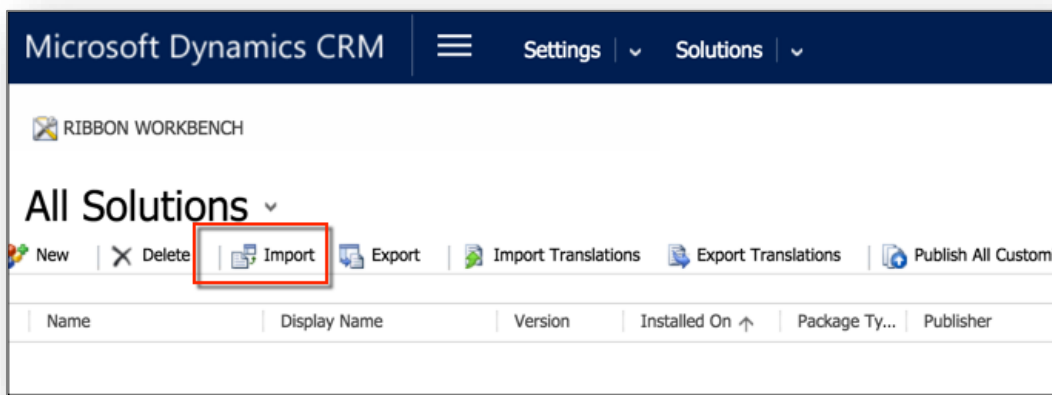
1. Click on the following link to access and download the current package as a .zip file for installation into **Dynamics 365 Online for Sales version 9.0 and above**:

<http://dnbhoovers.link/installMSD>

2. Save the .zip file to a local computer.
3. Within Dynamics 365, go to **Settings > Solutions**.

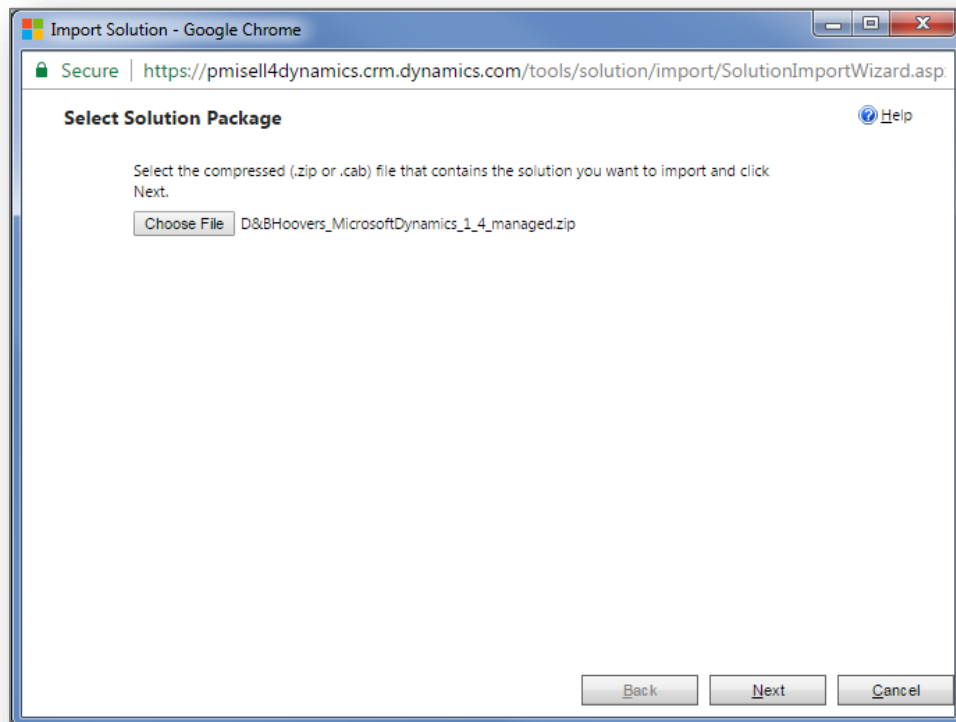


4. In the solutions list menu choose **Import**.

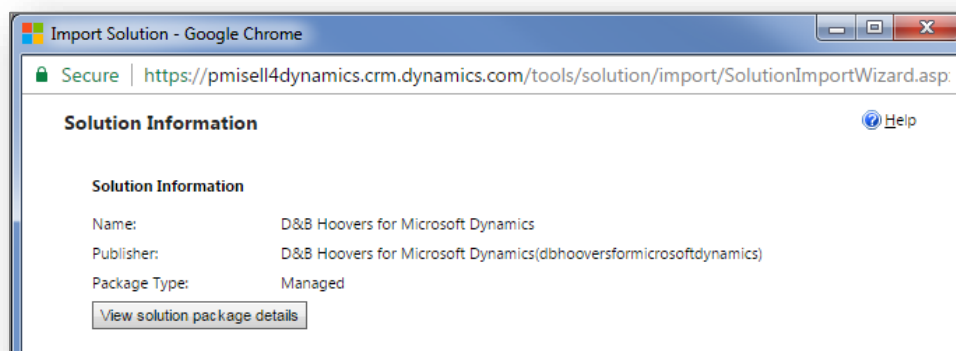


5. In the **Select Solution Package** dialog, browse for the D&B Hoovers Dynamics 365 package .zip file saved in Step 2.

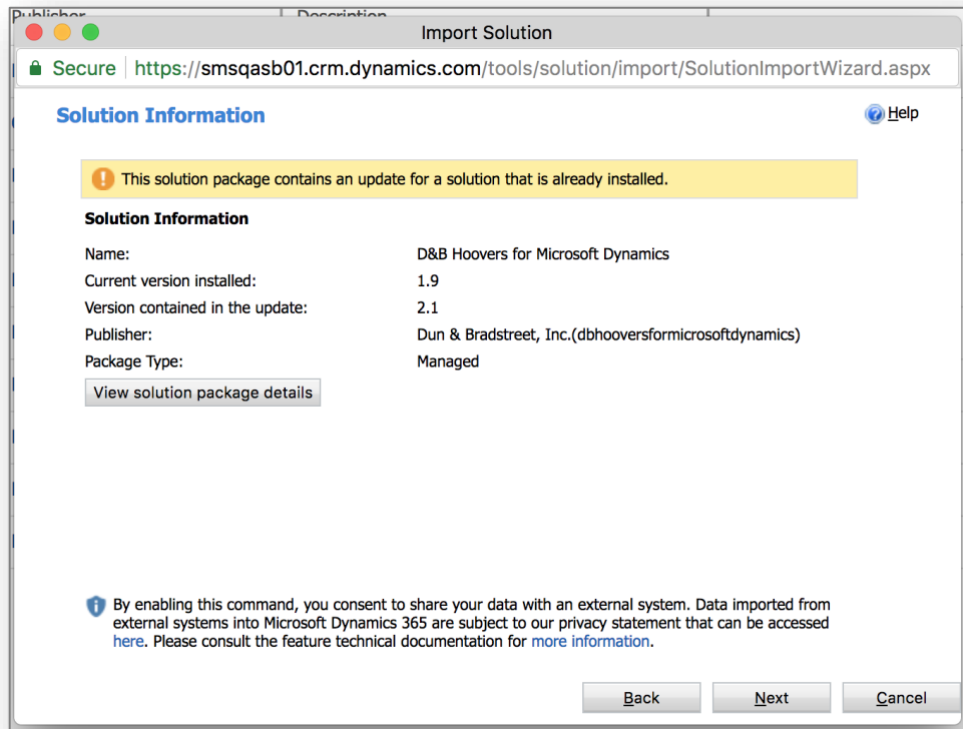
6. Choose **Next**.



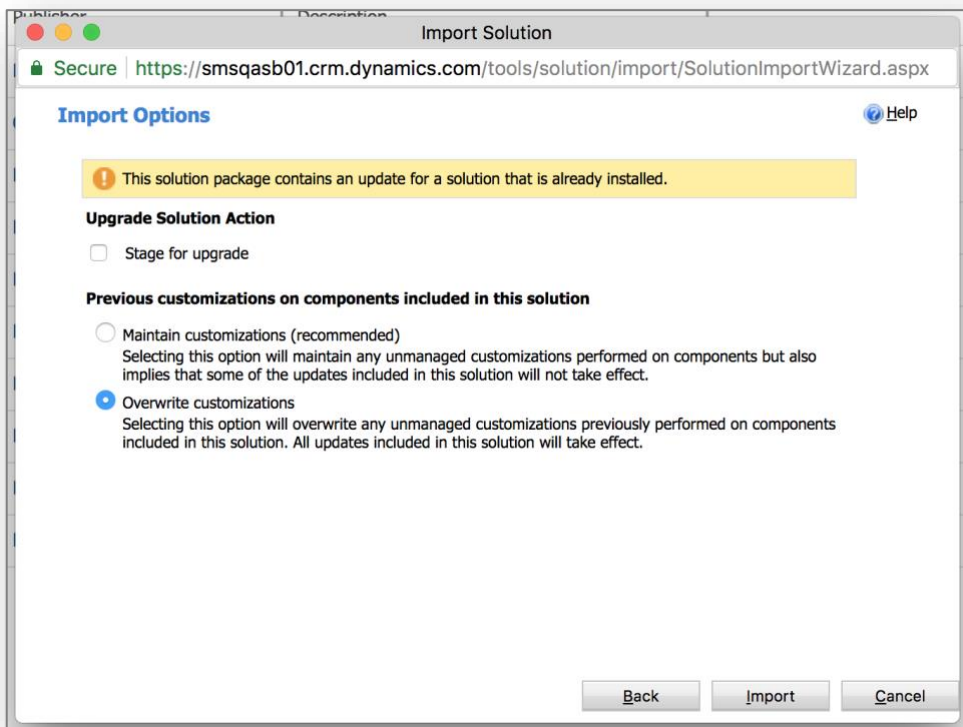
7. New clients: If desired, view information about the solution before choosing **Import**. Skip to step 9.



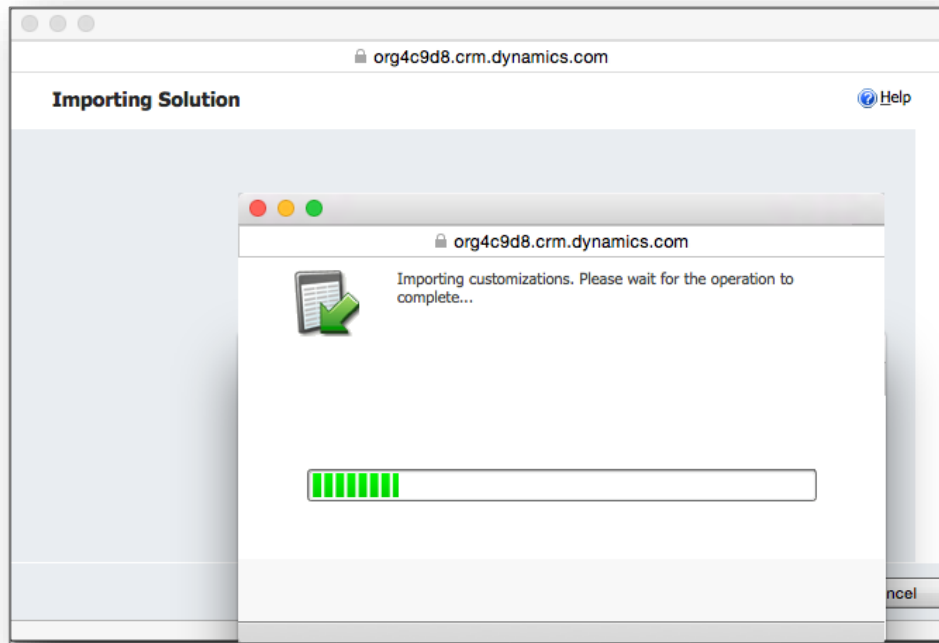
8. Existing clients upgrading from version 1.9 or earlier:  
a. If desired, view information about the solution, then click **Next**.



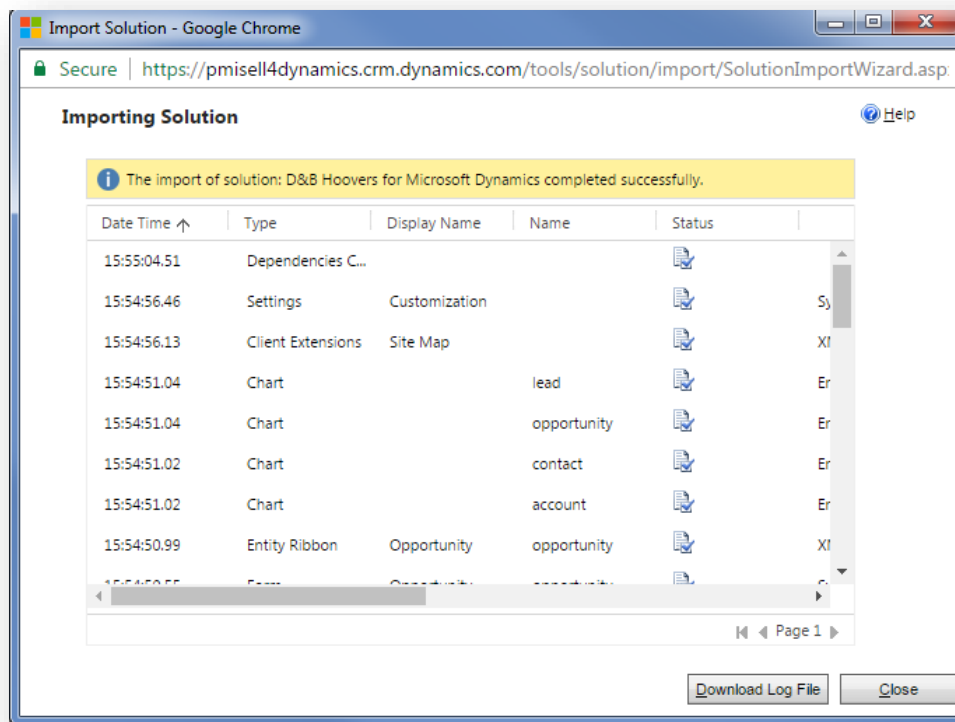
b. Select **Overwrite customizations**, then choose **Import**.



- A progress bar displays as the import completes.

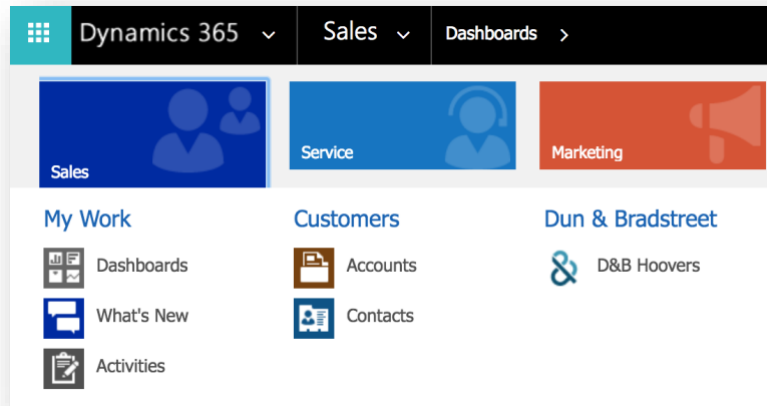


- Upon completion, view the results and choose **Close**.

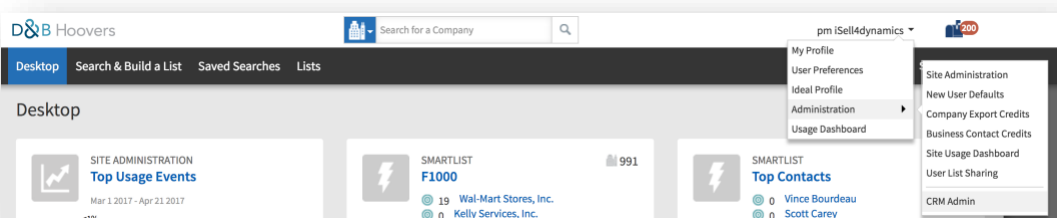


## Configuring D&B Hoovers in Dynamics 365

11. To configure any site-wide settings in the site's Dynamics 365 instance, start at the **CRM Admin** page within the D&B Hoovers application. Follow the steps below to access this page:
  - a. From the **Sales** menu, select **D&B Hoovers**.
  - b. **Tip:** Sign in with a Dynamics 365 username and password if not already logged in.

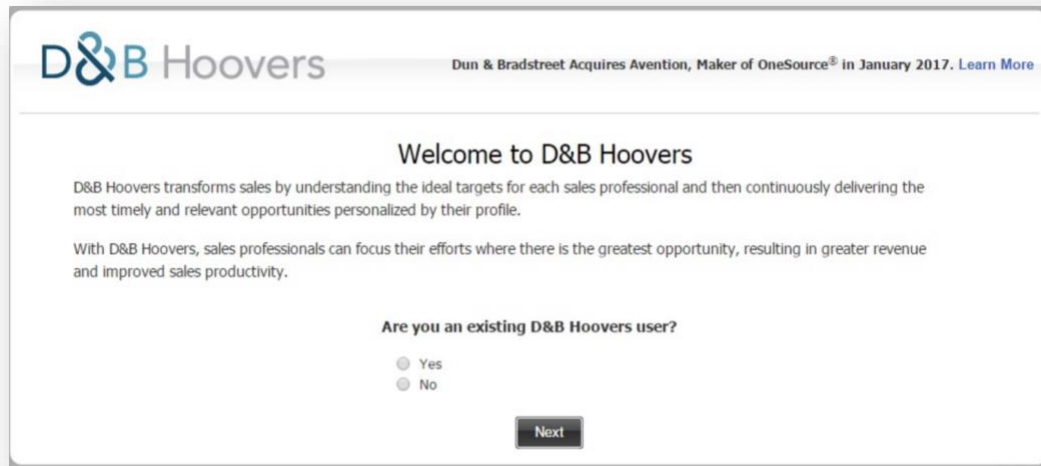


- c. Select the username in the upper right corner and then select **CRM Admin**.



12. Upon initial login, a welcome message displays that asks, "Are you an existing D&B Hoovers user?" If so, select **Yes** and enter your user credentials.

13. If not, select **No**, which will prompt a 3-day trial activation.



D&B Hoovers Dun & Bradstreet Acquires Avention, Maker of OneSource® in January 2017. [Learn More](#)

### Welcome to D&B Hoovers

D&B Hoovers transforms sales by understanding the ideal targets for each sales professional and then continuously delivering the most timely and relevant opportunities personalized by their profile.

With D&B Hoovers, sales professionals can focus their efforts where there is the greatest opportunity, resulting in greater revenue and improved sales productivity.

Are you an existing D&B Hoovers user?

Yes  
 No

Next

14. Before using D&B Hoovers in Dynamics 365, configure it for the organization by following the steps in the **D&B Hoovers Microsoft Dynamics 365 Customization Guide**.

## Other Resources

For help with installation or configuration, submit a support request via <https://support.dnb.com> or call one of the following numbers:

US: 1-800-486-8666

UK: +44 (0)845 145 1700

Rest of Europe: +44 (0)207 382 8840

Asia Pacific: +91 124 493 4709