

Plain-English Microsoft Tools Glossary

Eight terms small business operators actually need. No buzzwords.

Why this exists

Microsoft has a lot of product names. Most of them are surrounded by buzzwords that make them sound harder than they are. This glossary is for small business owners who want to know what each tool actually does, who it fits, and whether it matters to their week. If a term shows up in a sales email or a vendor pitch, look it up here first.

Business Central

Microsoft's accounting and operations system for small and mid-sized businesses.

What it does

Holds your books (general ledger, AP, AR, bank reconciliation, financial reporting). Holds your operations (inventory, sales orders, purchasing, jobs, projects). Connects to Excel, Outlook, Teams, and Power BI. One source of truth instead of three spreadsheets.

Who it fits

Businesses outgrowing QuickBooks or a basic accounting tool. Businesses running operations across spreadsheets and email. 10 to 250 employees. Businesses that plan to grow and do not want to migrate again in three years.

Worth knowing

Full name: Microsoft Dynamics 365 Business Central. Often shortened to BC.

Dynamics 365

Microsoft's family of business applications. Sales, customer service, field service, finance, supply chain, and Business Central all sit inside it.

What it does

Dynamics 365 is the umbrella. When someone says they use Dynamics 365 Sales, they mean the sales pipeline and CRM piece. Dynamics 365 Customer Service is the help desk piece. Business Central is the small business piece. You buy only the pieces you use.

Who it fits

Businesses that already have a couple of Microsoft tools and want their CRM, finance, or service work to live in the same family. Common when teams are already in Outlook and Teams.

Worth knowing

You do not buy Dynamics 365 as one product. You buy the specific app inside it.

Power Platform

Microsoft's low-code toolset. Lets your team build apps, automate steps, and make dashboards without writing code.

What it does

Three pieces. Power Apps builds small custom forms or apps (an order-entry form, a checklist for the warehouse, a customer onboarding form). Power Automate runs an action when something happens (new customer goes in, a welcome email fires). Power BI builds dashboards that pull live numbers from your systems.

Who it fits

Businesses that have one process living in someone's spreadsheet that everyone hates. Businesses that want to replace a manual handoff between two tools. Businesses that need a dashboard but do not have a data person.

Worth knowing

You do not need all three pieces. Most small businesses start with one.

Copilot

Microsoft's AI assistant built into the tools you already use.

What it does

Copilot is a button inside Outlook, Excel, Word, Teams, and Business Central. Inside Outlook it drafts emails. Inside Excel it writes formulas in plain English (you ask, it writes). Inside Business Central it summarizes a customer's order history or drafts a sales line. It is not a separate product you log into.

Who it fits

Businesses already using Microsoft 365 (Outlook, Excel, Word, Teams). The setup is small. It lights up inside the tools you already pay for.

Worth knowing

Copilot is a separate license per user. Worth piloting on one team before you license everyone.

Microsoft 365

The Microsoft productivity suite. Outlook, Word, Excel, PowerPoint, Teams, and OneDrive.

What it does

The tools you already think of when someone says Microsoft. Email, documents, spreadsheets, video calls, file storage. Most small businesses already have this.

Who it fits

Anyone who uses email and documents in a team. Standard for businesses 5+ people.

Worth knowing

Microsoft 365 is the base layer. Business Central, Power Platform, and Copilot all build on top of it.

Power BI

Microsoft's dashboard and reporting tool. Part of Power Platform but used so often it earns its own entry.

What it does

Pulls live data from Business Central, Excel, your accounting tool, or anywhere else. Shows it as a dashboard you can share with your team. Replaces the weekly spreadsheet someone builds by hand.

Who it fits

Businesses that have one number people argue about every week. Businesses where leadership wants a dashboard but the finance person does not want to build it by hand again.

Worth knowing

A small business Power BI dashboard takes 1 to 3 weeks to build the first time. After that it updates itself.

Dynamics 365 Customer Engagement (CE)

The CRM piece of Dynamics 365. Where sales and service teams track accounts, contacts, opportunities, and cases.

What it does

Holds your sales pipeline, customer contacts, deal history, and service cases. Connects to Outlook so sales reps work from their inbox. Connects to Business Central so finance can see the deal that became an order.

Who it fits

Businesses that have outgrown a spreadsheet pipeline or a basic CRM. Sales teams of 3+. Businesses that want CRM and finance in the same family.

Worth knowing

Often abbreviated CE. This is where the sales pipeline lives. Not the same as Business Central.

TruNova Launchpad

TruNorth Dynamics' pre-built Business Central deployment for small businesses. Fixed fee, live in 30 to 60 days.

What it does

A pre-configured Business Central setup with a starter chart of accounts, the standard small business modules turned on, training videos for your team, and 30 days of post-launch support. You get a working system and tune it after, instead of designing every detail up front.

Who it fits

Small businesses (10 to 100 employees) moving off QuickBooks or a similar tool. Businesses that want Business Central without a six-month project. Relatively standard operations: sales, purchasing, inventory, basic projects.

Worth knowing

Lives at launchpad.trunova.ai. Built by TruNorth Dynamics. Always referred to as TruNova Launchpad, never TruNova on its own.

What to do with this glossary

Keep it. Send it to anyone on your team who has to sit through a vendor pitch and walk out confused. If a tool is on the list, you can describe it in 30 seconds. If a tool is not on the list, ask why before you spend money on it.

About TruNorth Dynamics

TruNorth Dynamics is a Microsoft consultancy based in the United States and Canada. We implement Dynamics 365, Power Platform, and AI for clients in manufacturing, distribution, professional services, accounting and advisory, and nonprofit. 250+ projects shipped over 12+ years. We are small on purpose.