



Business Charts for SharePoint Online - User Guide

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1. Installation

1.1 Browser Compatibility

Business Charts is fully compatible with the latest versions of modern browsers.

Browser	Minimum Version	Status
Microsoft Edge	Latest	Fully Supported
Google Chrome	Latest	Fully Supported
Mozilla Firefox	Latest	Fully Supported
Safari	Latest	Fully Supported
Internet Explorer 11	-	Not Supported

1.2 User Permissions Required

To ensure a smooth installation and configuration experience, please ensure you have the appropriate permissions:

- **Site Collection Administrator** - Required for installation
- **Site Owner** - Required for deploying the solution
- **Site Member** - Required to add and configure web parts
- **Site Visitor** - Can view charts (read-only)

1.3 Add the App from Microsoft AppSource

Before beginning, ensure the account performing this procedure is a member of the **Site Owners** group or has equivalent permissions.

1. Navigate to the site where you want to add the app. Click the **Settings**  and then select **Add an app**.
2. On the Site Contents page, click Add an App.

3. When you get to the "My apps" page, look for the option to visit the SharePoint Store.
4. Once you are in the **SharePoint Store**, use the search bar to search for 'Business Charts'.
5. Once the app appears in the search result, click on it.
6. On the app page, click on **Add to Apps site** button.
7. Wait for the validation process to complete. You can choose to either **Only enable this app** or **Enable this app and add it to all sites** (recommended). If the latter option is not selected, the app will need to be individually added to each site where you want to use it.
8. And then click **Add** button.
9. Now the app has been successfully added to your SharePoint.

1.4 Add the App to Your Site

After the administrator has enabled the app in the Tenant App Catalog, follow these steps to add it to your specific site:

1. Navigate to the site where you want to use the app.
2. Click the **Settings** gear icon > **Add an app**.
3. On the **My Apps** page, find **Business Charts** under the "From Your Organization" section.
4. Click the **Add** button. The app will be installed on the site, and you will see it listed in **Site Contents**.

Note: If you selected "Enable this app and add it to all sites" during installation, the app is automatically added. You can skip this step.

1.5 Upgrade the App from AppSource

1. Navigate to the **App Catalog** site within your SharePoint Online tenant.
 2. Find the **Business Charts** in the App Catalog and click on it.
-

3. If an update is available, you will see an **Upgrade Store App** option in the command bar. Click this option to begin the upgrade process.
4. You'll be directed to a deployment page. You can choose to make the solution available to all sites in the organization. If this option is not selected, you'll need to manually update the app on each individual site.
5. Click the **Deploy** button to install the latest version of the app.
7. Navigate to the **Site Contents** page of a site where the app is deployed. Locate **Business Charts**, click the ellipses (...), and select **Details**.
8. Click **Get It** button to upgrade the app to the latest version.

Alternatively, you can delete the app from the App Catalog and then install the latest version from Microsoft AppSource.

Note: Your existing chart configurations and settings will be preserved during the upgrade or re-installation process.

1.6 Remove the App from a Site

1. Click **Settings** and then click **Site Contents**.
2. On the **Site Contents** page, find the app and click the ellipses (...) to view the app properties dialog.
3. In the callout, click the ellipses (...) and then click **Remove** on the menu.
4. Click **OK**.

1.7 Remove the App from your App Catalog

1. Sign into Office 365 as a global admin or SharePoint admin.
2. Select the app launcher icon  in the upper-left and choose **Admin** to open the Microsoft 365 admin center.
3. In the left pane, choose **Admin centers** > **SharePoint**.

4. Select **apps** in the left pane, and then select **App Catalog**.
5. Click the **Apps for SharePoint** to display available SharePoint apps.
6. Click the **Business Charts** to display the context menu and choose **Delete**.
7. Click **OK** on the confirmation message.
8. The app is removed from the **App Catalog**.

Warning: Removing the app from the App Catalog will disable it on all sites where it is currently installed.

2. About Business Charts Configuration

The Configuration Panel allows you to transform raw SharePoint data into visual insights. The configuration workflow is streamlined: **Select Data** > **Define Axes** > **Apply Styles**.

2.1 Chart Type

In this section, select the visual format that best represents your data. Business Charts offers a wide variety of visualization options, including Column, Bar, Line, Area, Pie, and Donut charts.

Tip: You can switch chart types at any time to preview which visualization provides the clearest insight.

Chart Type	Use Cases	Features
Bar Chart	<ul style="list-style-type: none">• Sales by department• Monthly task completion counts• Product revenue comparison	<ul style="list-style-type: none">✓ Multiple Y-axis fields✓ Dual Y-axis support✓ Group by (Series) support✓ All aggregation types

<p>Line Chart</p>	<ul style="list-style-type: none"> • Monthly sales trends • Project progress tracking • Website traffic over time 	<ul style="list-style-type: none"> ✓ Multiple Y-axis fields ✓ Dual Y-axis support ✓ Group by (Series) support ✓ All aggregation types
<p>Pie Chart Donut Chart Treemap Chart</p>	<ul style="list-style-type: none"> • Task status distribution • Budget allocation • Market share 	<ul style="list-style-type: none"> ✗ Single Y-axis field only ✗ Dual Y-axis not supported ✗ Group by (Series) not supported ✓ Requires aggregation (cannot use "No Aggregation")
<p>Area Chart</p>	<ul style="list-style-type: none"> • Cumulative revenue • User growth trends • Inventory levels over time 	<ul style="list-style-type: none"> ✓ Multiple Y-axis fields ✓ Dual Y-axis support ✓ Group by (Series) support ✓ All aggregation types
<p>Stacked Bar Chart</p>	<ul style="list-style-type: none"> • Product line sales by month • Task types by project • Budget allocation over quarters 	<ul style="list-style-type: none"> ✓ Multiple Y-axis fields ✗ Dual Y-axis not supported ✓ Group by (Series) support ⚠ Average aggregation not supported (mathematically incorrect for stacking)
<p>Radar Chart</p>	<ul style="list-style-type: none"> • Employee skill assessments • Product feature comparison • Performance evaluations 	<ul style="list-style-type: none"> ✓ Multiple Y-axis fields (dimensions) ✗ Dual Y-axis not supported ✓ Group by (Series) support ✓ All aggregation types
<p>Combo Chart</p>	<ul style="list-style-type: none"> • Sales (bars) + Profit margin (line) • Quantity (bars) + Unit price (line) 	<ul style="list-style-type: none"> ✓ Multiple Y-axis fields ✓ Dual Y-axis support ✓ Group by (Series) support ✓ All aggregation types
<p>Scatter Chart</p>	<ul style="list-style-type: none"> • Price vs. sales volume • Hours worked vs. quality score • Age vs. income 	<ul style="list-style-type: none"> ✓ Multiple Y-axis fields ✓ Dual Y-axis support ✓ Group by (Series) support ✓ Defaults to "No Aggregation" (shows individual data points)

2.2 Dimensions Settings

The **Dimensions Settings** section defines *what* data to display and *how* to aggregate it.

Dimension Settings ^

Dimension (X-axis)

Country v

Measures (Y-axes)

Amount x

Group by (Series/Legend)

v

Aggregation Method

Count

Sum

Average

Maximum

Minimum

Dimension (X-axis)

Purpose: Defines how data is grouped (the categories on the horizontal axis).

Configuration Steps:

1. In the **Dimension Settings** section, locate the **Dimension (X-axis)** dropdown.
2. Select a field from the list.

Supported Field Types:

- ✓ Single line of text
- ✓ Choice

- ✓ Date and Time
- ✓ Number
- ✓ Boolean
- ✓ Lookup
- ✓ User
- ✓ Managed Metadata
- ✓ Location
- ✓ ID
- ✓ Content Type

Measure (Y-axis)

Purpose: Defines *what* to measure (the values on the vertical axis).

Configuration Steps:

1. Under **Dimension Settings** tab, find **Measure (Y-axis)** or **Measures (Y-axes)** section.
2. Select one or more fields from the dropdown.
 - For Bar, Line, Area, Stacked Bar, Scatter, and Combo charts, you can select multiple fields.
 - For Pie, Donut, and Treemap charts, you can only select a single field.

Supported Field Types:

- ✓ Number - All aggregations
- ✓ Currency - All aggregations
- ✓ ID - Use Count aggregation
- ✓ Calculated - All aggregations
- ✓ Date and Time - Count, Max, Min only
- ✓ Single line of text - Count only
- ✓ Choice - Count only
- ✓ Yes/No - Count only

2.3 Aggregation Method

Purpose: Defines *how* to calculate values from the raw data. Six options are available:

1. No Aggregation

- **Description:** Display raw data without any calculation
- **Restrictions:**
 - Cannot use with Group by (Series)
 - Cannot use with Date Grouping
 - Not available for Pie/Donut/Treemap charts

2. Count

- **Description:** Count the number of items in each category
- **Supports:** All field types

3. Sum

- **Description:** Add up all values
- **Supports:** Number, Currency, Calculated (numeric output)

4. Average

- **Description:** Calculate the mean value
- **Supports:** Number, Currency, Calculated (numeric output)

5. Max

- **Description:** Find the maximum value in each category
- **Supports:** Number, Currency, Calculated

6. Min

- **Description:** Find the minimum value in each category
- **Supports:** Number, Currency, Calculated

Smart Aggregation Rules: The system automatically adjusts available options based on:

1. **Field type:** Text fields only show "Count"
2. **Chart type:** Pie charts cannot use "No Aggregation"
3. **Constraint:** Stacked Bar charts do not support "Average"

4. **Group by:** When Group by is selected, "No Aggregation" is disabled

Date Grouping

Purpose: Automatically group date values into time periods for cleaner charts.

Prerequisites:

- X-Axis field must be a **Date and Time** type
- Aggregation Method cannot be "No Aggregation"

Available Options:

None (Default)

- Shows exact date values
- Use when you have few unique dates

Year

- **Format:** 2024, 2025, 2026

Quarter

- **Format:** Q1 2024, Q2 2024, Q3 2024, Q4 2024

Month

- **Format:** Jan 2024, Feb 2024, Mar 2024

Day

- **Format:** 8/25/2024, 8/26/2024

Group by (Series)

Purpose: Create multiple data series on the same chart, each represented by a different color.

When to Use:

- Compare multiple categories simultaneously
- Show composition within categories
- Analyze distribution across dimensions

Configuration:

1. In the **Dimension Settings** tab, find **Group by (Series/Legend)** dropdown.
2. Select a field to group by.
3. The chart will create a separate series for each unique value in that field.

Supported Chart Types:

- ✓ Bar Chart
- ✓ Line Chart
- ✓ Area Chart
- ✓ Stacked Bar Chart
- ✓ Scatter Chart
- ✓ Combo Chart
- ✓ Radar Chart
- ✗ Pie Chart
- ✗ Donut Chart
- ✗ Treemap

Restrictions:

- Cannot use with "No Aggregation"
- Mutually exclusive with Multiple Y-Axis fields (select one method or the other).
- Available only for Cartesian charts (Bar, Line, Area, etc.)

Dual Y-Axis Configuration

Purpose: Use two separate Y-axes when comparing metrics with very different scales.

Prerequisites:

- Must select **exactly 2 Y-axis fields**
 - Supported chart types: Bar, Line, Area, Scatter, Combo
-

Configuration Steps:

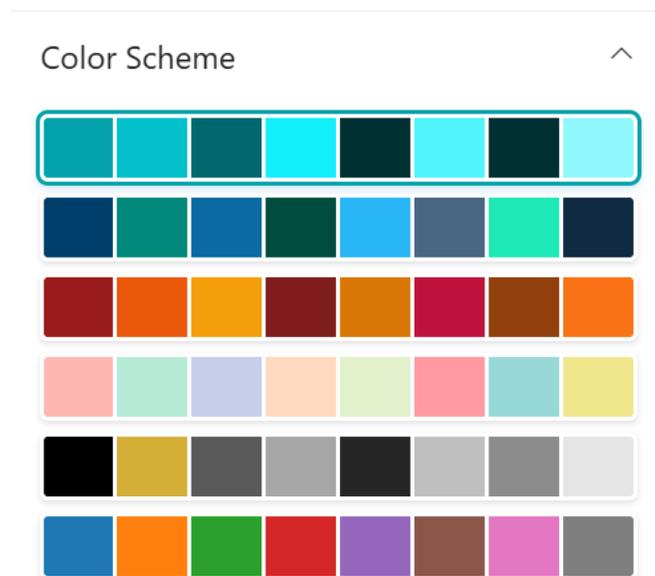
1. Select 2 fields in the **Y-Axis** multi-select dropdown.
2. Enable the "**Enable Dual Y-Axis**" toggle.
3. The first field uses the **left Y-axis**.
4. The second field uses the **right Y-axis**.

2.4 Styling and Display Options

The **Styling** tab controls the visual appearance of your chart.

Color Schemes

Purpose: Define the color palette for your chart.



Preset Color Schemes

1. Site Theme

- Automatically uses your SharePoint site's theme colors
- Matches your organization's branding
- Updates automatically if site theme changes

- **Recommended** for consistency across your tenant
2. Additional presets include **Professional, Ocean, Magma, Macaron, Greyscale,** and **High Contrast.**
 3. **Custom Color Scheme**



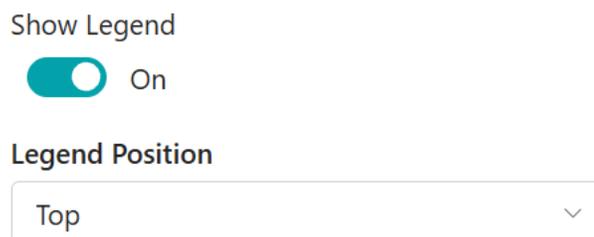
Purpose: Define your own branded colors.

Configuration Steps:

1. In the **Custom Scheme** section, assign a specific color to each slot. You can specify up to 8 colors.
2. Colors can be left empty (shows as gray).
3. The app will cycle through defined colors for multiple series.

Legend Configuration

Purpose: Display a legend to identify different data series.



Options:

- **None:** No legend displayed (saves space)
- **Top:** Legend appears above the chart
- **Bottom:** Legend appears below the chart

Toggle Control:

- Use the "**Show Legend**" toggle to quickly show/hide

Data Labels

Purpose: Display values directly on the chart.

Show Data Labels



Configuration:

- Use the "**Show Legend**" toggle to quickly show/hide

Axis Labels

Show X-axis Title



Show Y-axis Title



Show X-Axis Label

- **Purpose:** Display the name of the X-axis field
- **Default:** OFF (Self-explanatory via chart title or legends)

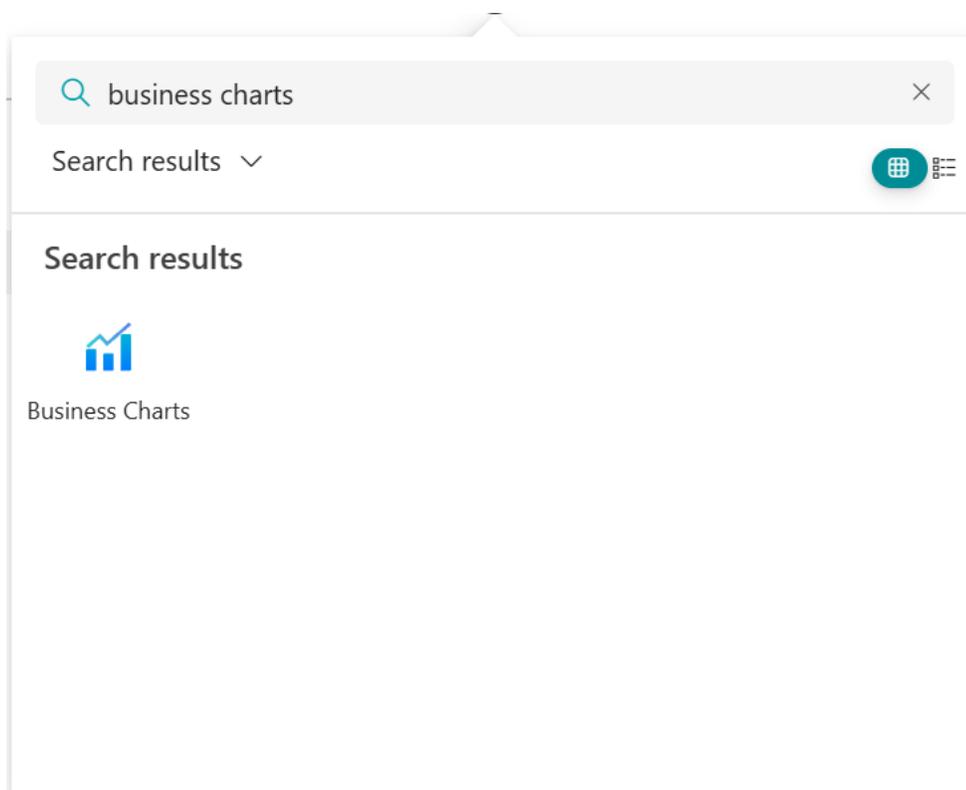
Show Y-Axis Label

- **Purpose:** Display the name of the Y-axis field(s)
- **Default:** OFF

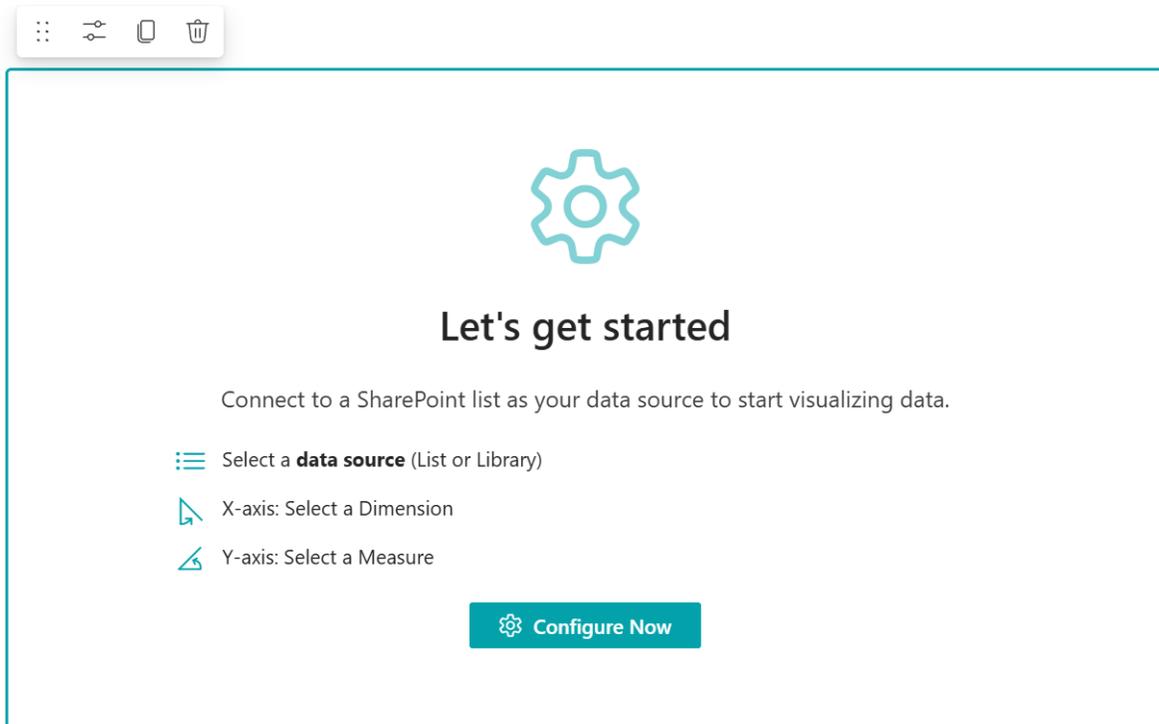
3. Start to Create a Chart

3.1 Add the Web Part to a Page

1. Navigate to the page.
2. Click **Edit** in the top-right corner.
3. Hover over the section divider and click the + (plus) icon to insert a new web part.
4. In the web part picker, type "Business Charts" in the search box.



5. Click on the **Business Charts** to add it to the page.
6. Click the **Configure Now** button, or select the **Edit web part** (pencil icon) on the left.



7. The configuration panel will open on the right side.

3.2 Connect to a SharePoint List

The Data Source tab is where you connect your chart to SharePoint list data.

1. With the web part in edit mode, open the property pane (click the pencil icon).
2. Configure the **Data Source** settings:

Business Charts ✕

Set up your data source

Data Source ^

Chart Title

Sync title with list name

Off

Site URL

Leave empty to use current site

Select List

 ▼

Filter by View

 ▼

3. For the chart title, you can specify a title for this chart. Alternatively, toggle **On** the "Sync title with list name" option to automatically use the SharePoint list name.

4. **Site URL:**

- Leave blank to use the current site
- OR enter the full URL of another site (<https://yourtenant.sharepoint.com/sites/sitename>). If entering a full URL, click the **Test Connection** icon  to verify access permissions.

Note: You must have **Read** permission on the target site and list.

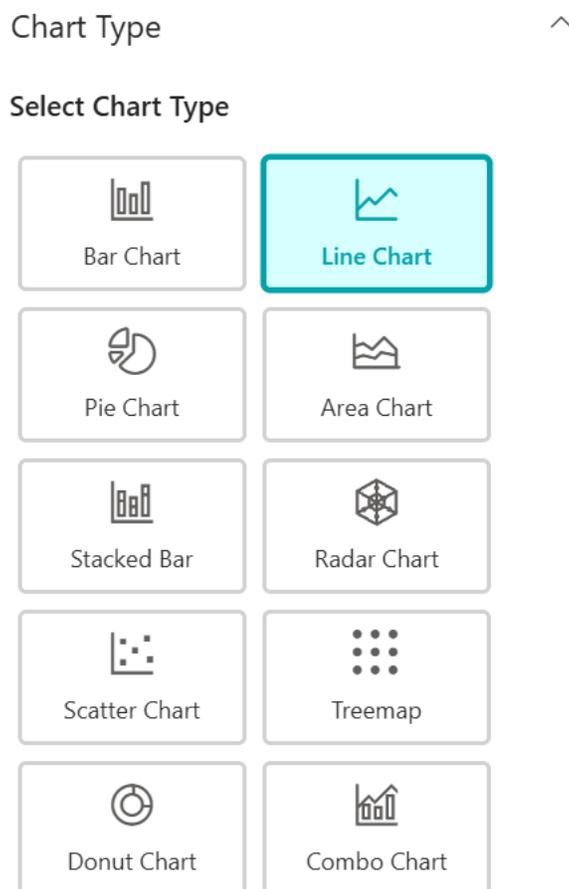
5. **Select List:** Choose the SharePoint list you want to connect to. The chart will be generated based on the data from this list.

6. Select View: Choose a specific list view to filter the data. The chart will render only the items available in that view.
7. Once you select a list or a view, the app will automatically generate a default bar chart based on the data of list, you can change the chart type, X or Y axis later.

3.3 Create a Chart

Once you connect to a SharePoint list, you can create a chart in the web part.

1. In the **Chart Type** section, select your desired visualization (e.g., **Line Chart**).



2. In the **Dimension Settings** section, specify the **X-Axis** and **Y-Axis**.
3. In the **Aggregation Method** section, select "Sum".

Dimension Settings ^

Dimension (X-axis)

Category v

Measures (Y-axes)

Amount x

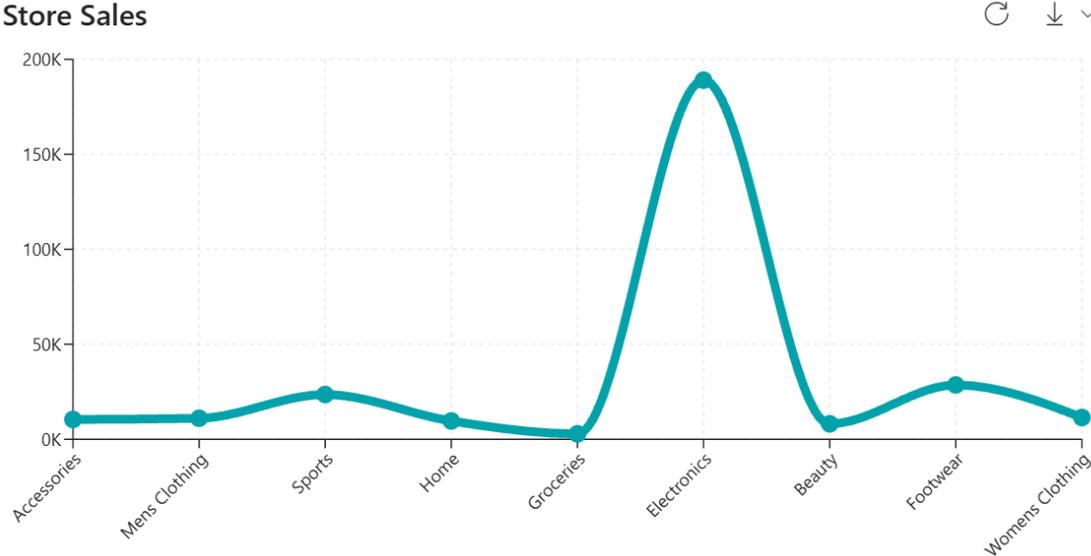
Group by (Series/Legend)

v

Aggregation Method

- No Aggregation (Raw Data)
- Count
- Sum
- Average
- Maximum
- Minimum

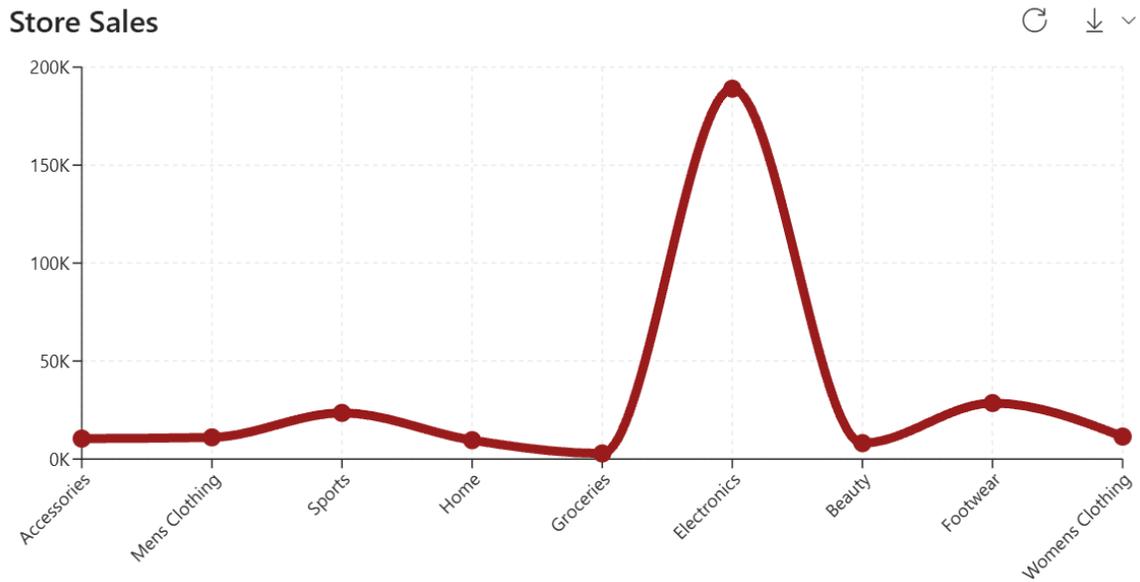
4. The chart appears instantly!



5. By default, the chart will use the first site theme. However, you can choose another theme.

Color Scheme ^

Row 1	Row 2	Row 3 (Selected)	Row 4	Row 5	Row 6
Teal, Light Teal, Dark Teal, Cyan, Dark Navy, Light Cyan, Navy	Dark Blue, Green, Blue, Dark Green, Light Blue, Grey, Bright Green, Dark Navy	Dark Red, Orange, Yellow, Dark Red, Orange, Red, Brown, Orange	Light Pink, Light Green, Light Purple, Light Orange, Light Green, Pink, Light Blue, Yellow	Black, Gold, Grey, Grey, Black, Grey, Grey, Light Grey	Blue, Orange, Green, Red, Purple, Brown, Pink, Grey



6. In the **Display Options** section, specify the legend, data label, X and Y-axis title.

Display Options ^

Show Legend On

Legend Position

Show Data Labels On

Show X-axis Title On

Show Y-axis Title On

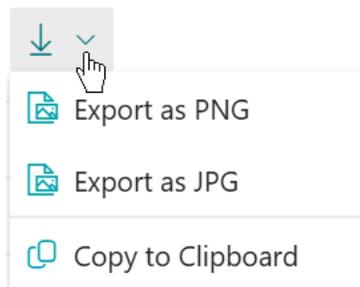
7. Now the elements are all shown in the chart.

Store Sales



3.4 Exporting Charts

You can export the chart as an image or copy to clipboard. The app supports three image formats: **PNG** (High Quality) and **JPG** (Good Quality).



1. Ensure your chart is fully loaded.
2. Click the **Export** button (download icon) located in the top-right corner of the chart area.
3. Select your desired format from the menu:
 - Export as PNG
 - Export as JPG

- Copy to clipboard

3.5 Field Type Reference

Complete Field Type Support Matrix

SharePoint Field Type	X-Axis	Y-Axis	Aggregations Supported	Notes
Single line of text	✓	✓	Count	Common for names, categories
Multiple lines of text	⚠	✗	-	Not supported
Number	✓	✓	All	Full aggregation support
Currency	✓	✓	All	Auto-formats with currency symbol
Date and Time	✓	✓	Count, Max, Min	No Sum/Average
Yes/No	✓	✓	Count	True/False displayed
Choice	✓	✓	Count	Dropdown or radio buttons
Multiple Choice	✓	✗	-	Semicolon-separated values
Lookup	✓	✗	-	Shows related list value
Person or Group	✓	✗	-	Shows user display name
Hyperlink	✗	✗	-	Not supported for visualization
Picture	✗	✗	-	Not supported for visualization
Calculated	✓	✓*	Depends on output	*Only numeric output types
Attachments	✗	✗	-	Not meaningful for charts

Managed Metadata	⚠	✗	-	Limited support
ID (Counter)	✓	✓	Count	Used for counting items

Legend:

- ✓ = Fully Supported
- ⚠ = Limited Support (See notes)
- ✗ = Not Supported
- All = Count, Sum, Average, Max, Min

Calculated Field Output Types

Output Type	Excel Equivalent	Supported as Y-Axis	Aggregations
Text	TEXT	Yes (Count only)	Count
Boolean	TRUE/FALSE	Yes (Count only)	Count
Number	NUMBER	Yes	All
Currency	CURRENCY	Yes	All

Appendix: Subscription Management

The Business Charts trial subscription is valid for **30 days** starting from the date of first use.

If the trial subscription period ends, you will need to purchase a subscription.

Business Charts is licensed on a per-site (Site Collection) or per-tenant basis, billed annually.

For a site collection subscription, there are no end-user limitations. All users in site collection can access the app.

For a tenant subscription, there are no limitations on sites or site collections. All users can access the app in all sites or site collections within the same tenant.

Checking Subscription Status

- a. After adding a Business Charts web part, the subscription status will be shown on the top of the web part. If the subscription is about to expire within 30 days, the notification message will display the remaining days.

Your subscription will expire in 29 days.

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■ UK ■ India ■ Australia ■ New Zealand ■ USA ■ Canada

- b. To update the subscription status, click on the notification message, and the License Information dialog will show up.

License Information ✕

Your subscription will expire in 29 days.

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{7242226d-d384-4905-91c9-d51b6894ba5e}
Site Url:	<input type="text"/>
Product:	Business Charts 1.0.18.212 
License Type:	Trial
Expiration Date:	03/14/2026 
Premium Support:	No

Click the refresh icon next to the expiration date, the new status will be loaded.

- c. Once the subscription status changes to "Your subscription has expired on mm/dd/yyyy", it means that your subscription has expired.

Your subscription has expired on 02/11/2026.

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UK India Australia New Zealand USA Canada

- d. To purchase or renew a subscription, please email sales@boostsolutions.com with your **Site URL**, **Site ID**, and **Tenant ID**.

- e. For a **Site Subscription**, the license status will appear as follows:

The license type is Site.

License Information ✕

Your subscription will expire in 365 days.

Tenant ID: ae586225-a936-4e32-b424-6a57e257cf0c

Site ID: {7242226d-d384-4905-91c9-d51b6894ba5e}

Site Url: https://bsmark.sharepoint.com/sites/DEMO

Product: Business Charts 1.0.18.212 

License Type:

Expiration Date: 02/13/2027 

Premium Support: No

f. For a **Tenant Subscription**, the license status will appear as follows:

The license type is Tenant.

License Information ✕

Your subscription will expire in 365 days.

Tenant ID: ae586225-a936-4e32-b424-6a57e257cf0c

Site ID: {7242226d-d384-4905-91c9-d51b6894ba5e}

Site Url: https://bsmark.sharepoint.com/sites/DEMO

Product: Business Charts 1.0.18.212 

License Type: Tenant

Expiration Date: 02/13/2027 

Premium Support: No