

Assign a Chart to a client

Give a published Chart template to one client, set that client's own choices, activate the Chart and check that it is ready for the Staff App.

WHO IT IS FOR Owner, Admin	TIME NEEDED About 8 minutes	LAST REVIEWED 2 October 2026
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Who this is for

Permissions: You need **Can manage client charts** and **Can view chart templates**. Owners and Admins have both by default. Managers and Coordinators can manage client charts, but they cannot view chart templates by default, so + Add chart is greyed out for them. A manager limited to certain sites sees only the clients at their own sites.

Before you begin

- You are signed in to BondiByte on a computer.
- The Chart template is published. A new or cloned template needs to be activated first. See [Create an organisation Chart template](#) and [Clone a built-in Chart template](#).
- The client already exists in BondiByte.



Steps

1 Go to **Clients** > the client's record

- 1 In the left menu, choose **Clients**. The **Client Records** list opens.
- 2 Choose the name of the client you want to give the Chart to. Their record opens.

The screenshot shows the BondiByte interface. On the left, the 'Clients' menu item is highlighted with a blue circle and a '1' next to it. The main area displays a table of client records. The 'Mason Ibrahim' record is highlighted with a blue circle and a '2' next to it.

NAME	STATUS	ACTIVE	ACTIONS
Noah Bennett Noah	Active	Active	Deactivate
Ruby Chen Ruby	Active	Active	Deactivate
Chloe Davis Chloe	Active	Active	Deactivate
Mason Ibrahim Mason	Active	Active	Deactivate
Ethan Kaur Ethan	Active	Active	Deactivate
Daniel Mensah Dan	Active	Active	Deactivate
Lucas Miller Luke	Active	Active	Deactivate
Grace O'Connor Grace	Active	Active	Deactivate
Henry Roberts Henry	Active	Active	Deactivate
Avery Sample -	Active	Active	Deactivate
Isla Taylor Isla	Active	Active	Deactivate
Amelia Watson			

Choose **Clients** in the left menu (1), then the client's name (2).

2 Open the **Charts** tab

- 1 On the client's record, choose the **Charts** tab. The **Client Chart setup** section lists the Charts assigned to this client.
- 2 Choose **+ Add chart**. The **Add chart** window opens.

The screenshot shows the client record for Mason Ibrahim. The 'Charts' tab is highlighted with a blue circle and a '1' next to it. The 'Client Chart setup' section is visible, showing a table of charts assigned to the client. The '+ Add chart' button is highlighted with a blue circle and a '2' next to it.

Client Chart setup

Charts assigned to Mason Ibrahim, with their client-specific choices and effective-dated versions.

NAME	STATUS	EFFECTIVE FROM
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Choose the **Charts** tab (1), then **+ Add chart** (2).



3 Choose the Chart template

- 1 In **Chart template**, choose the Chart. Only templates with the status **Published** are listed.
- 2 Choose **Continue**. Choose **Cancel** instead to close the window without assigning anything.

Chart template: Required. A list that starts on **Select a chart template**. It lists only the Chart templates in your organisation with the status **Published**, so a Draft or Archived template is not listed. If there are none, the window says **No published chart templates yet** and links to the **Chart Library**. You cannot continue until you choose one.

Note: Built-in templates are not listed. A built-in template has to be cloned and activated before it can be assigned. See Clone a built-in Chart template.

Choose the Chart template (1), then Continue (2).



4 Configure the Chart for this client

The **Configure chart for this client** window opens.

- 1 In **Chart name**, keep the template's name or type a name for this client's Chart.
- 2 For each choice field, such as **Drink**, choose **+ Add option** and type an option this client needs. Add at least one option for each choice before you activate the Chart. Use the arrow buttons to change the order and **Remove** to delete an option.
- 3 Leave **Activate now** unticked to save the Chart as a Draft, or tick it to make the Chart active straight away. Staff can only record entries once the Chart is active.
- 4 Leave **Show on the staff app** ticked to turn on the template's Staff App switch, or untick it to leave the switch off. This box appears only while the switch is off.
- 5 Choose **Add chart**.

Chart name: Required. It starts as the template's name. It is the name shown for this client's Chart in **Client Chart setup**, and the name staff see in the **Charts** list on the Staff App. You can change it later with **Edit configuration**. If the box is empty, a message says **Enter a name for this chart**.

Options for each client-specific choice, for example Drink: One block for each Single choice or Multiple choice field whose choices are set for each client. The block is headed with the field's label and marked **Options for this client only**. Choose **+ Add option** and type the option. Until you type, the box shows Option 1, Option 2 and so on. Use the up and down buttons to change the order, and **Remove** to delete an option. An empty list shows **No options yet**. **Add at least one before activating this chart**. Every option needs text, otherwise a message says **Give every option a label before saving** and names the choice. If the template has no client-specific choices, the window says **This chart has no client-specific choices to configure**.

Activate now: Optional tick box, unticked to start with, with the note **Staff can only record entries once this chart is active**. Unticked, the Chart is saved as a **Draft**. Ticked, the Chart is added and activated in one go, which needs at least one option in each client-specific list. Otherwise a message says **This chart cannot be activated yet** and names the choices that need options.

Show on the Staff App: Optional tick box labelled **Show on the staff app**, ticked to start with. It appears, under the note **This chart is not shown on the staff app yet**, only while the template's **Staff mobile app** switch is off. Ticked, it turns that switch on when you choose **Add chart**. The switch belongs to the template, not to one client. Unticked, the switch stays off. Staff still see the Chart only for clients it is assigned to, once it is active. If you do not have permission to manage Chart templates, the box is replaced by the note to ask someone who can manage charts to turn on **Show on staff mobile app** in the Chart Library. If the switch is already on, neither the note nor the box appears.

Important: The options are saved with this client's Chart, not with the template. Another client given the same template starts with an empty list and sets their own.



Configure chart for this client

Set this client's options for "Sample Fluid Chart" before adding it.

Close

Chart name

Sample Fluid Chart

Drink

Options for this client only.

Water

^ v Remove

Diluted cordial

^ v Remove

Milk

^ v Remove

+ Add option

☐ **Activate now**

Staff can only record entries once this chart is active.

This chart is not shown on the staff app yet.

☒ **Show on the staff app**

Turns on this chart's staff app switch. Staff still only see it for clients it is assigned to, once it is active.

Cancel

Add chart

Chart entries

Every entry recorded against this client's charts.

Check the chart name (1), add this client's options (2), choose whether to activate now (3) and whether to show the Chart on the Staff App (4), then choose Add chart (5).



5 Check the new Chart in **Client Chart setup**

- 1 A message confirms that the Chart was added as a draft. If you ticked **Activate now**, the message says it was added and activated instead, and adds that it is available on the Staff App for this client when the template's switch is on.
- 2 The Chart appears in **Client Chart setup**. Its **Status** is **Draft**, and **Effective from** shows today's date and version 1.

Mason Ibrahim

1 → "Sample Fluid Chart" added as a draft.

Clients > **Mason Ibrahim** [← Back to Clients](#)

Mason Ibrahim Active

MI NDIS participant · Self Managed · Mobile preferred · Site-based rostering [Edit client](#)

Overview # Billing Details Service Agreements 1 Documentation 0 Reports 1 **Charts** Sites 1 History 3 Imported history Intelligence

Client Chart setup [+ Add chart](#)

Charts assigned to Mason Ibrahim, with their client-specific choices and effective-dated versions.

NAME	2	STATUS	EFFECTIVE FROM
Sample Fluid Chart		Draft	02/10/2026 (version 1)

Rows 50 ▾ [Back](#) 1-1 of 1 charts [Next](#)

Chart entries

Every entry recorded against this client's charts.

Chart Range

The confirmation message (1) and the new Chart in the list, shown as a Draft (2).



6 Activate the Chart if you left **Activate now** unticked

- 1 On the Chart's row, choose the actions button (three dots).
- 2 Choose **Activate**.

Note: If the template's Staff App switch is still off, a window asks **Activate this chart?** and offers **Show on the staff app**, ticked to start with. Leave it ticked and choose **Activate** to turn the switch on as well. Untick it to activate the Chart and leave the switch off. Choose **Cancel** to close the window without activating.

Mason Ibrahim

Clients > Mason Ibrahim

Mason Ibrahim Active
NDIS participant
Self Managed Mobile preferred Site-based rostering

Overview # Billing Details Service Agreements 1 Documentation 0 Reports 1 **Charts** Sites 1 History 3 Imported history Intelligence

Client Chart setup + Add chart
Charts assigned to Mason Ibrahim, with their client-specific choices and effective-dated versions.

NAME	STATUS	EFFECTIVE FROM
Sample Fluid Chart	Draft	02/10/2026 (version 1)

Rows 50

Back

Download PDF
Edit configuration
Activate

Chart entries
Every entry recorded against this client's charts.

Chart Range

Choose the actions button on the row (1), then Activate (2).



7 Check that the Chart is Active

- 1 A message confirms that the Chart was activated and is available on the Staff App for this client.
- 2 The **Status** of the Chart is now **Active**.

The screenshot shows the client profile for Mason Ibrahim. The 'Charts' tab is selected, displaying a table of charts assigned to the client. A confirmation message (1) is shown at the top right, stating 'Sample Fluid Chart' is activated. The chart's status (2) is 'Active'.

NAME	STATUS	EFFECTIVE FROM
Sample Fluid Chart	Active	02/10/2026 (version 1)

The confirmation message (1) and the Status now showing Active (2).

8 Check the Staff App switch in the Chart Library

In the left menu, choose **Configuration**, then choose **Chart Library**. Stay on the **Organisation templates** tab.

- 1 On the template's row, **Assigned to** now says how many clients have the Chart.
- 2 The **Staff mobile app** switch is on.

The screenshot shows the 'Organisation templates' page. The 'Sample Fluid Chart' row is highlighted, showing 'Assigned to 1 client' (1) and the 'Staff mobile app' switch is turned on (2).

NAME	STATUS	VERSION	ASSIGNED TO	STAFF MOBILE APP	UPDATED	EDIT	PREVIEW	DEACTIVATE	ASSIGN TO CLIENT	CLONE	ARCHIVE
Sample Fluid Chart	Published	v1	Assigned to 1 client	☒	02/10/2026 06:10 pm						
Sample Meal Chart	Published	v1	Not assigned to a client yet	☐	02/10/2026 05:32 pm						

The number of clients the Chart is assigned to (1) and the Staff mobile app switch, now on (2).



What happens next

The Chart now belongs to this client. It appears in **Client Chart setup** with its own status, its own options and version 1. Another client needs their own assignment, with their own options. A Chart is never shared between clients.

Once the Chart is **Active** and the template's Staff App switch is on, staff can record entries for this client on the Staff App. Recorded entries appear under **Chart entries** further down the client's **Charts** tab.

To change this client's options later, choose **Edit configuration** in the row's actions menu. Existing entries are not changed.

A Client Chart has three statuses. **Draft** means it was added but is not active yet. **Active** means staff can record entries, once the template's Staff App switch is on. **Inactive** means it has been switched off.

To stop new entries, choose **Deactivate** in the row's actions menu. BondiByte asks **Deactivate this chart?**. Choose **Deactivate** to confirm. The **Status** changes to **Inactive** and the entries already recorded are kept. To bring the Chart back, choose **Activate** in the same menu.

Important notes

Important: A Chart is available only for the client it is assigned to. Assigning a template to one client does not make it available for any other client.

Tip: You can also assign a Chart from the template. In the **Chart Library**, choose **Assign to client** on a Published template's row. The same windows open, with an extra **Client** list at the start.

Good practice

- Add every option the client needs before you tick **Activate now**. An active Chart must keep at least one option in each client-specific list, and BondiByte will not activate it until each list has one.
- Give the Chart a name that staff will recognise in the **Charts** list on the Staff App. The name starts as the template's name, so add a short word that tells it apart if you will assign the same template to many clients.
- After you activate a Chart, check the **Staff mobile app** switch for its template in the **Chart Library**. Staff see the Chart only while that switch is on.
- When a client's needs change, choose **Edit configuration** and, under **When should these changes take effect?**, choose **Choose a date** to bring the change in on a future date. Entries already recorded are not changed.



Troubleshooting

The **+ Add chart** button is greyed out.

Why it happens: Assigning a Chart needs permission to manage client charts and to view chart templates. A role without both cannot use the button.

What to do: Ask an Owner or Admin to assign the Chart, or to check your role.

The **Add chart** window says **No published chart templates yet**.

Why it happens: No template in your organisation has the status **Published**.

What to do: Open the **Chart Library**, choose **Activate** on a Draft template, or create one first, then try again.

A message says **This chart is already assigned to this client. Open the existing chart to change it**.

Why it happens: This client already has a Chart from the same template.

What to do: Look for the existing Chart in **Client Chart setup**. Use **Edit configuration** in its actions menu to change it.

A message says **This chart cannot be activated yet** and names a choice, for example **Drink**.

Why it happens: A client-specific choice has no options, so the Chart cannot be made active.

What to do: Choose **+ Add option** under that choice and add at least one option, then save again. If you saw the message after choosing **Activate** in the row's actions menu, choose **Edit configuration**, add the options, choose **Save changes**, then choose **Activate** again.

A message says **Give every option a label before saving**.

Why it happens: One of the options is empty.

What to do: Type a label in every option, or choose **Remove** next to the empty one.

The Chart is **Active**, but staff cannot see it on the Staff App.

Why it happens: The Chart appears for a client only when its template is Published and its Staff App switch is on, the client's Chart is Active with a current version and complete choices, and the staff member is allowed to work with that client.

What to do: Check each of these in turn. The **Staff mobile app** switch is in the **Chart Library**, and the Chart's **Status** is in the client's **Charts** tab.

Need more help?

Guides: bondibbyterobotics.com.au/guides | Support: support@bondibbyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
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