Bp Allied V7 SP3 Release Notes

These release notes describe the changes made to Bp Allied since version 7 Service Pack 2 Revision 2 (v7.2.44830.0).

Release Date	1 June 2023
Release version	Bp Allied version 7 Service Pack 3 (v.7.3.45051.0)
Notes last updated	27 September 2023
What is in this release?	This release of Bp Allied includes enhancements, and bug fixes and patch fixes.
Which version can I upgrade from?	You can upgrade to V7 Service Pack 3 from Bp Allied. To check the current program version that you have installed, select **Help** > **About**.
Which database and operating system versions are supported?	No changes to supported operating systems or database since the last release of Bp Allied.
When should I upgrade?	Best Practice Software recommend running the program upgrade outside of business hours.
How do I upgrade?	Click here to download an upgrade guide for this version.
What do I do after upgrading?	Review the section Changes in V7 SP3 for more information on changes after upgrading.

Upgrade to Bp Allied V7 SP3

Best Practice Software recommends running program updates outside of business hours. Upgrade instructions are available in the Upgrade Guide.

- Review the Bp Allied system requirements to see the minimum recommendations for hardware, peripherals, and connectivity for the most recent versions of Bp Allied.
- Review the section Changes in V7 SP3 for more information on changes after upgrading. Bug fixes, enhancements and work-flow changes are described below.

Changes in V7 SP3

The **V7 SP3** release (v.7.3.45051.0) includes the following updates:

## Zoom migration to server-to-server OAuth

Due to the deprecation of previous connection methods used by Zoom, updates have been made to Bp Allied. The Bp Allied Zoom integration now uses a server-to-server OAuth connection method. Clinics using Zoom integration for Telehealth appointments will need to update their Zoom connection method.

NOTE The Zoom account used to set up the Zoom integration must have **Owner** or **Admin** privileges.

---

1. Go to https://marketplace.zoom.us/
2. Click **Sign In** and login using your Zoom account email and password.
3. Click on **Develop** > **Build App**.
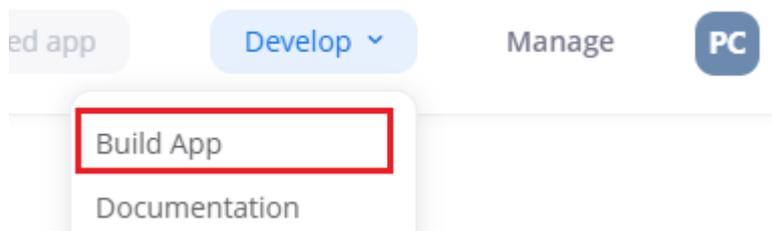
4. On the **Choose your app type** page select **Server-to-server OAuth** > **Create**.

---

5. In **App Name** enter 'Bp Allied'.
6. Click **Create**.
7. From the **App Credentials** tab, **Copy** the credentials for **Account ID**, **Client ID**, **Client Secret** into Bp Allied.

8. In Bp Allied go to **Options** > **User Administration**.
9. Search for the required practitioner.
10. Select the **Zoom** tab.
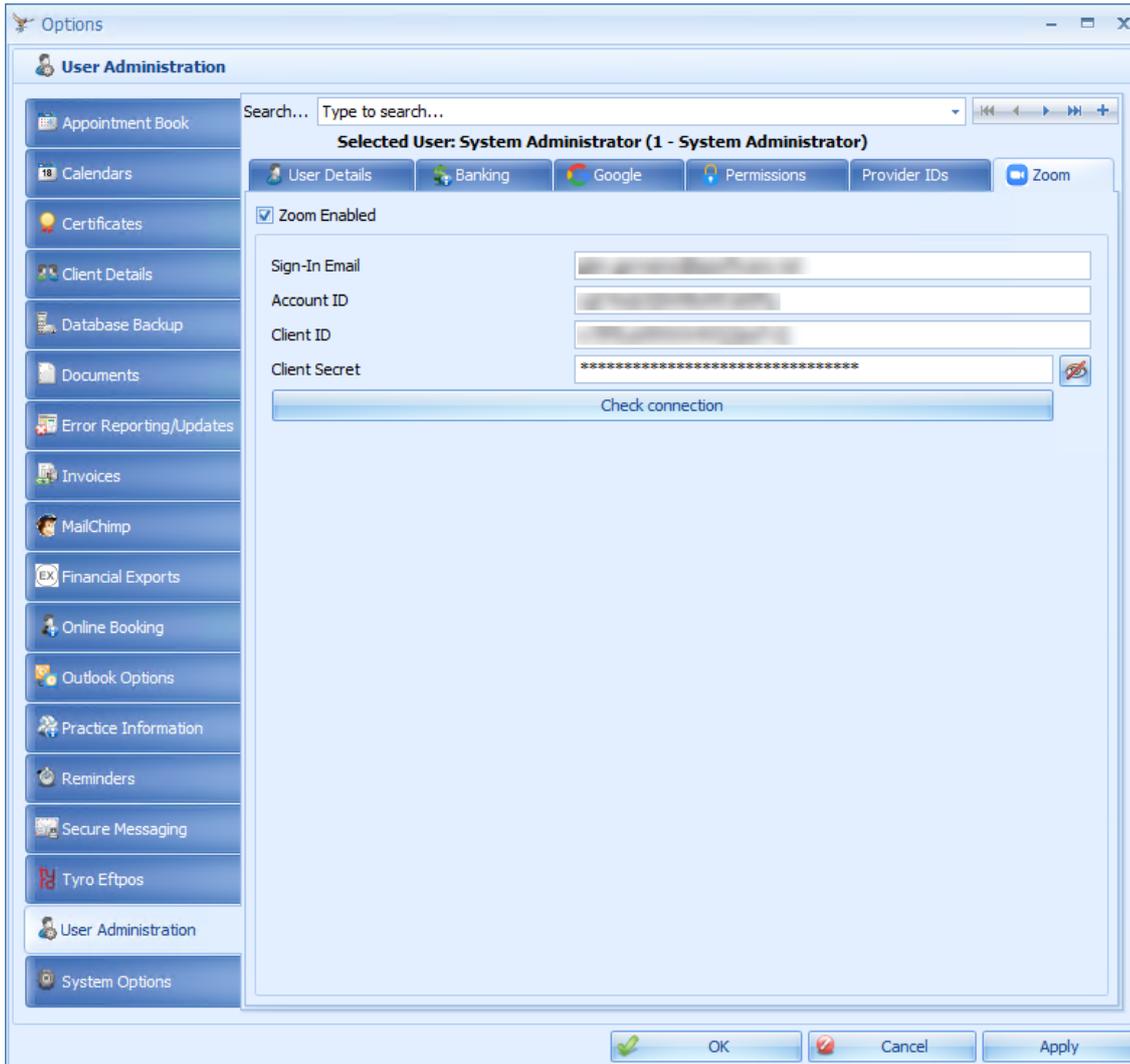
11. Check **Zoom Enabled**.
12. Enter the **Sign-In Email**.
13. Enter the **Account ID** and **Client ID**, and **Client Secret** copied from the **Zoom App Credentials screen**.
14. From the **Zoom** website, click **Continue** in the **App Credentials** tab.
15. Complete all fields in the **Information** tab.

Bp Allied Connector

Intend to publish: No   Account-level app   Server-To-Server OAuth

Basic information

App name

Bp Allied Connector

19/50

Short description ⓘ

Allows Bp Allied to Create and Sync Zoom Meetings with Client A|

74/150

Company Name

Developer Contact Information

Provide your **corporate** email for us to contact you for service impacting announcements, including new Marketplace/API updates, breaking changes, and other updates as well as information that directly impacts your app.

Name

Email address

Sidebar:
- ✓ App Credentials
- ● Information
- ● Feature
- ● Scopes
- ● Activation

16. Click **Continue**.
17. Select **Continue** in the **Feature** tab.
18. From the **Scopes** tab select the **Add Scopes** button.

## Bp Allied Connector

Intend to publish: No   Account-level app   Server-To-Server OAuth

Add Scopes

Scopes define the API methods this app is allowed to call, and thus which information and capabilities are available on Zoom. Scopes are restricted to specific resources like channels or files. If your app is submitted to Zoom, we will verify the need for all requested scopes against the features that your app has to offer at the time of review. Please remove unneeded scopes before you submit your app. Learn more about Zoom's scopes

🔍 Search name, ID, type   + Add Scopes

Sidebar:
- ✓ App Credentials
- ● Information
- ● Feature
- ● Scopes
- ● Activation

‹ Back

Continue

19. Select the scope type **Meeting** and tick **View and manage all user meetings**.

20. From the **User** scope type select **View all user information**.

21. Select **Done**.
22. From the **Add Scopes** screen select **Continue**.

23. From the **Activation** screen select **Activate your app**.
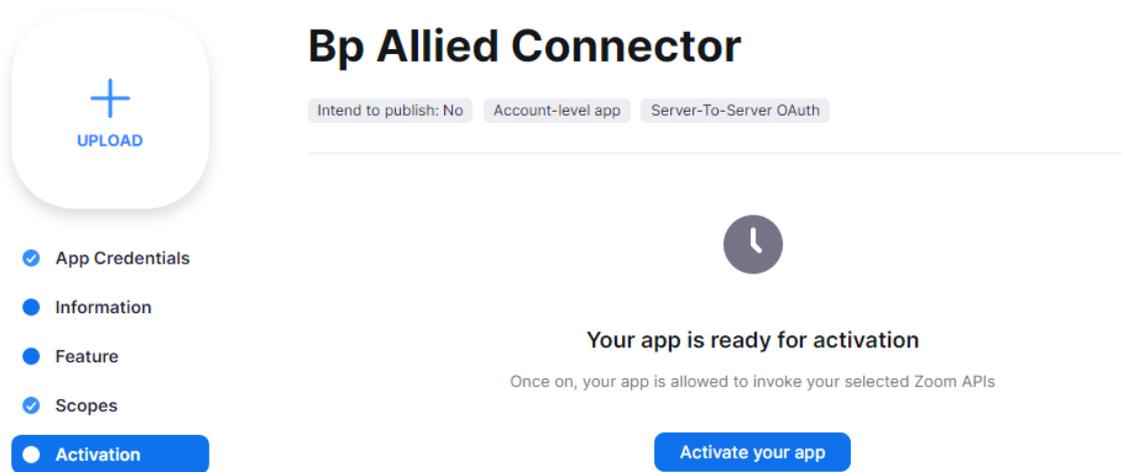
24. The confirmation screen will appear.
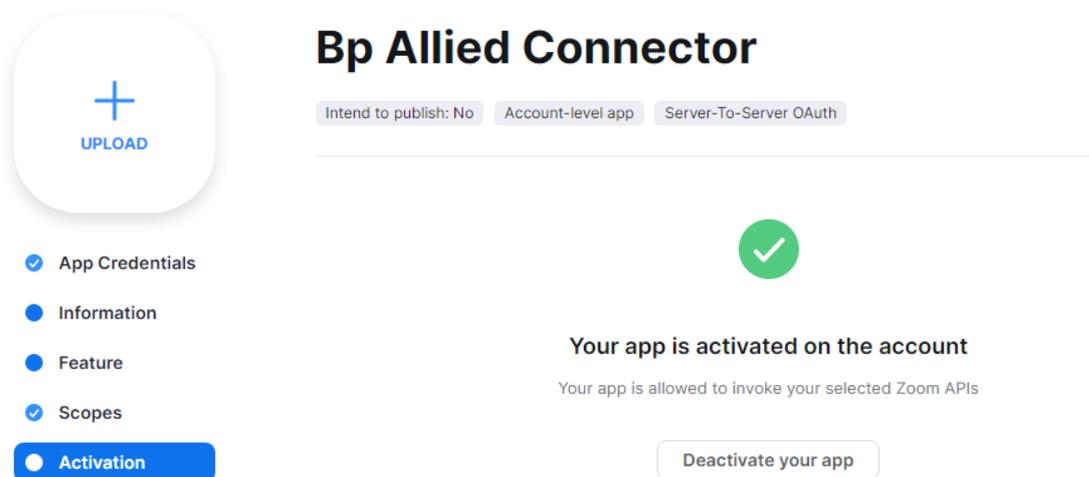
25. In Bp Allied go to **Options** > **User Administration**.
26. Search for the required practitioner.
27. Select the **Zoom** tab.
28. Click **Check Connection**.
29. Click **Ok** to save and close.

Enhancements

Function	Release Notes	Key
Bp Allied Installer	The Bp Allied installer has been updated to remove the automatic sign up to **Educate** newsletters.	40394
Client Details	A **Green Flag** has been introduced to the **Client Details** to indicate a patient's COVID vaccination status. The Green Flag will appear on appointments in the **Appointment Book**.	66639
Third Party Billers	The ability to make a **Third Party Biller** inactive has been added to Bp Allied.	67106
Syncing	Microsoft have ended support for the .Net syncing framework previously used in Bp Allied's synchronisation function. The ability to sync within Bp Allied has been removed.	69431
Add Client Access Records	When using **Add Client Access Records**, only **Active Users** will be included in the list.	71032

Bug fixes

Function	Release Notes	Key
Automated Email	When an **automated email** is sent the sender has been updated from 'MP Auto Reminder' to Bp Allied.	19666
Bp Allied Scheduler	Previously when using a standalone server for Bp Allied, the **Bp Allied Scheduler** application would not run. This issue has been resolved.	19688
Client Details	An issue has been resolved for practices using **Practice Type 11 (Oral Surgeon)** where an error would occur in Bp Allied when accessing Client Details.	41418
Permissions	Previously **Permission 4010** would not apply restrictions correctly based on the permission assigned to the user. Updates have been made to resolve this issue.	62276
User Roles	Changes have been made to resolve an issue for users with a **System Administrator** role that were unable to view all **Client Details** in previous versions of Bp Allied.	68712
Medicare Claim Report	When selecting **Reset to Default** in the Medicare Claim report no changes were made to the report. This functionality has been restored.	69351
Bp Allied Installer	An issue has been resolved with the Bp Allied Installer, where the application would fail when checking for the **Database Version**.	70255
Body Chart	When switching between clients with an open **Body Chart** record, Bp Allied would show the same Body Chart results for different patients. This issue has been resolved.	70659

Function	Release Notes	Key
Google Calendar	Changes have been made to resolve an issue with **Google Calendar sync** continuing to display an update window that obstructed the screen for the user once completed.	70764
Zoom	An issue has been resolved for users testing **Zoom Credentials** receiving an **Invalid Credentials** error with valid credentials.	70819
Permissions	When **resetting permissions** for users with the prior role of **Practitioner All Clients**, the user was added to the **Not Permitted** list and was unable to access any client records. This issue has been resolved.	70907
Client Record	Changes have been made to resolve a delay when switching from tabs other than the **Body Chart** record between clients from the **Client Record**.	71667
Client Record	Updates have been made to the **Body Chart** tab to highlight the date of the image in focus and to arrange the image list from most recent to oldest.	72114
Client Record Merge	Previously when merging duplicate client records that both contained information in the **Client History**, only the data recorded in the **client record to be kept** was retained. This issue has been resolved.	72539
Bp Allied Installer	Changes have been made to the Bp Allied Installer to check that the Assigned Practitioner field was correctly added to the database in the previous Bp Allied update and to allow the use of either .NET Version 4.7 or 4.8 framework.	72687

Patch fixes

The following bug fixes have been updated in Bp Allied post-release.

Function	Release Notes	Key	Version
Appointment Book	An error has been resolved in Bp Allied where the program would produce an error and shut down when a user selected **Print Preview** or **Page Setup** from the Appointment Book.	72633	7.3.45188.0
MBS (Schedule Fees)	When selecting **Update Products & Services** from MBS (Schedule Fees) Bp Allied would produce an error or shut down. This issue has been resolved.	73075	7.3.45188.0
Zoom App	Zoom meetings would previously cause Bp Allied to shut down as Zoom passwords were not created. This error has been resolved.	73697	7.3.45188.0

Want to know more?

Select **Help** > **Help** from Bp Allied to open the Knowledge Base for more resources in Bp Allied.

- Set up a Zoom integration for telehealth
- Filling out the Client Record
- Add a Third Party biller