Getting started checklist

This checklist serves as a guide for the initial set-up and go-live process and considerations. There are also links in the Bp Allied Getting Started page on our knowledgebase to everything covered in this checklist.

There are references in this guide to contact the Sales, Support or Training teams. Their contact details are contained in your welcome pack.

Things to consider prior to going live

	Data Importing – are you importing your own client information? Read more...
	Are you syncing or using Bp Allied Partially Hosted? Ensure that you understand Syncing and the implications for your site. Read more...
	Are you using Bp Allied Fully Hosted? There are functional differences with this version. Read more...
	Database back-ups - if you have Bp Allied installed on your server then use our built in back-up option, otherwise, ensure that you set up your own back-ups to protect your data. *Hosted clients using Bp Allied fully or partially hosted will have their back-ups carried out on our server.*
	Customise your Invoice templates – discuss this with the Bp Allied Support team. Read more...
	Customise Client Details – if you have specific information to enter then get this sorted from day one. Talk to the Bp Allied Sales or Support team for additional help and guidance. Read more...

What integrations do you plan to use?

These can be implemented at go-live, or later depending on what suits your clinic.	
	SMS Reminders - Click on the Bp SMS link within your Welcome email to sign up or contact the Bp Allied Sales team.
	Export financials to Xero or MYOB - Read up on how these work and the limitations of each option. Assemble any activation or credential information required.
	Set up Secure Messaging – talk to your provider to let them know that you're moving to Bp Allied. Assemble any activation or credential information required. Read more…
	Medicare Online Claiming (including DVA Claiming) – Click on the Medicare Online link within your Welcome email to sign up or contact the Bp Allied Sales team. It takes 3 to 4 weeks for Medicare to process your details. No Medicare PKI certificate is required. Read more…
	Tyro Eftpos or HealthPoint claiming – contact Tyro to sign up. Read more here and here…
	Sync to Google Calendar – Read more…
	Export Client list to Mail Chimp – Read more…

Set up required prior to go-live

This first section covers those things that must be initially setup within Bp Allied to allow appointments and invoices to be created, reminders sent and referrals to be managed.	
	Get your team up to speed • Several introductory & Bp Masterclass videos can be accessed at Bp Online, our online learning centre. • Contact our Training team to arrange training • Get familiar with our Knowledgebase
	Add users & practitioners and allow calendar access as required. Read more…
	Update Practitioner Availability for all practitioners. Read more…
	Add Products and Services so that these can be selected in appointments and automatically added to an invoice. Read more…
	Update Practice and Location information to be used in appointment selection and then automatically added to an invoice. Read more…
	Set up Provider Numbers for Practitioners to appear on an invoice. Read more…
	Set up known referrers (if they are not being imported) Read more…
	Set up known Third Party billers. Read more…
	Customise drop down lists if required. Read more…
	Set up Invoicing numbering options for each location (if required). Read more…

Set up required for each user login

If the support team know what these are then they can help replicate these settings at time of installation / set-up.	
	Set up SMS Reminder settings. Read more…
	Set up Email Reminder settings – enables emailing from within Bp Allied. Read more…
	For Hosted users fill in the Automated Reminder form to get SMS & Email reminders automatically sent, and replies received in. Read more…
	Put customised Invoice templates in place, if required contact the Support team
	Put customised Client Layout in place, if required contact the Support team
	Update Appointment Book options e.g. work hours. Read more…
	Update Calendar options e.g. order of calendar display in the appointment book. Read more…
	Customise Client Details options e.g. time stamp and Client ID settings. Read more…