



ORIENTAL SPA

STAFF HANDBOOK

Reception, the dashboard, and the client's My Profile and consultation form
— how it all fits together at Platteloof and Brackenfell.

ORIENTAL SPA · PLATTEKLOOF & BRACKENFELL · 2 OCTOBER 2026

CONTENTS

Part A · How it all fits together

A1	The big picture
A2	Every link, who opens it, what they see
A3	Three journeys, start to finish
A4	Reference numbers — what each one means
A5	What is live today (2 October 2026)

Part B · The reception dashboard

B1	Signing in
B2	Finding your way
B3	Start of the day
B4	The booking desk
B5	Walk-in & phone bookings
B6	Managing a booking
B7	Calendar & new bookings
B8	Upcoming web bookings
B9	Day settings
B10	Records & the daily report
B11	Invoices
B12	Vouchers

B13	Redeeming a voucher
B14	Client records & consultation forms
B15	End of the day
B16	When something goes wrong
B17	Who does what
B18	Specials & partner offers (management)

Part C · My Profile & the consultation form

C1	The idea in one page
C2	The links
C3	How clients get the link
C4	Signing in
C5	The client's profile
C6	Filling in the form
C7	New clients
C8	What reception sees and does
C9	Paper forms
C10	Privacy rules for staff (POPIA)
C11	When something goes wrong
C12	What is live today (2 Oct 2026)

How to use this handbook. New staff: read Part A first — it is the map. Then keep Parts B and C at the desk as reference. Screenshots use invented client names, numbers and emails.

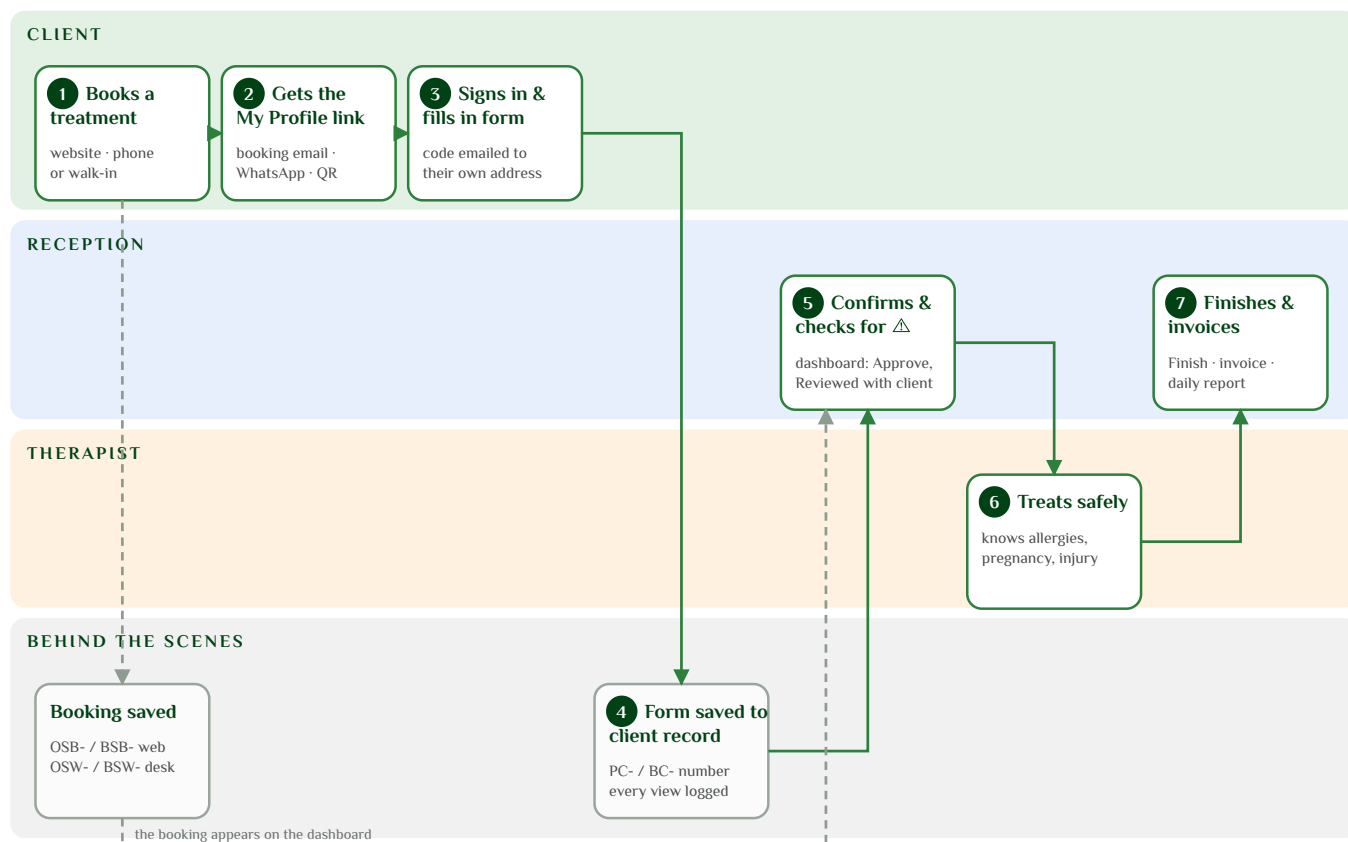


HOW IT ALL FITS TOGETHER

The client journey across the website, My Profile and the dashboard — every link, who uses it, and three journeys from booking to report.

A1 THE BIG PICTURE

Three places, one client. The client books and fills in their consultation form on their own phone; reception works in the dashboard; the therapist treats with the form's warnings in mind. Everything meets in the client's record, under one **client number**.



Place	Who	What happens there
www.orientalspa.co.za	Anyone	Menu, online booking, gift vouchers, contact. The booking email it sends carries the My Profile link.
myprofile.orientalspa.co.za	The client	Signs in with their email and a code; sees their visits; fills in or updates the consultation form.
dashboard.orientalspa.co.za	Reception & management	Bookings, walk-ins, invoices, vouchers, daily report. Opens the client records and the training site.

Address	Who opens it	How they sign in	What they can see
www.orientalspa.co.za	Public	—	The public website. Location pill switches Platteklouf / Brackenfell.
myprofile.orientalspa.co.za	The client	Email → 6-digit code sent to that email. No SMS.	Only their own profile: client number, visits, their forms, their details.
myprofile.orientalspa.co.za/ form	The client	Opened from their profile	Their consultation form, already filled in with their details.
dashboard.orientalspa.co.za	Reception, management	Work email → 5-character code	Everything for the branch(es) the account is allowed. Branch accounts see only their branch.
clients.orientalspa.co.za	Reception, management	Handed over from the dashboard (Clients), or the same work-email code	Client records and consultation forms for the branch(es) allowed. Every form opening is logged.
training.orientalspa.co.za	Staff	— (not on the public site, not in search engines)	This handbook and the guides to download; links to the training school (LMS, students) in the dashboard.

Retired: consent.orientalspa.co.za (switched off 2 Oct 2026). Every link we send points at My Profile.

THE ONE RULE BEHIND ALL OF IT

Nobody gets in with a phone number alone. A client proves who they are with a code sent to *their own email*; staff with a code sent to their *work email*. Never read a code out, send one on, or ask a client for theirs.

1 · A client books online

- 1 **Client** Books on the website. Gets an email with the reference (**OSB-/BSB-**) and the My Profile link.
- 2 **Reception** Sees it in **Upcoming** as "awaiting confirmation" and taps **Approve** — the client is emailed. (Part B, section B8.)
- 3 **Client** Opens My Profile, signs in with the emailed code and fills in the consultation form. (Part C, sections C4–C6.)
- 4 **Reception** Sees $\triangle$ on the booking if the form needs attention; opens the consultation only if needed. (Section B14.)
- 5 **Reception** On arrival: checks the answers with the client, taps **Reviewed with client**, then **Start**.
- 6 **Therapist** Treats with the warnings in mind (e.g. "avoid abdomen", "nut-oil allergy").
- 7 **Reception** **Finish**, invoice or record the payment; at the end of the day the daily report. (Sections B6, B11, B10.)

2 · A walk-in or phone booking

- 1 **Reception** Asks "have you been with us before?" — search the name or number in client records.
- 2 **Reception** Books them in the **Walk-in / phone client** form (section B5). Reference **OSW-/BSW-**.
- 3 **Reception** No form on file? **Send consent form** on the booking — or hand over a paper form from **Forms** (section C9).
- 4 **Client** Fills it in on their phone while they wait.
- 5 **Reception** Checks for $\triangle$, **Reviewed with client**, **Start**; after the treatment **Finish** and invoice.

3 · A returning client with a gift voucher

- 1 **Client** Quotes their client number (e.g. **PC-0142**) or phone number, and shows the voucher.
- 2 **Reception** Opens their record: is the form **up to date**? If their health has changed — pregnancy, injury, new medication — they update it in My Profile first.
- 3 **Reception** Books them and enters the voucher code in the walk-in form, or redeems it from **Invoices** → **Redeem voucher** (section B13).
- 4 **Therapist** Treats; reception finishes the session.

A4 REFERENCE NUMBERS — WHAT EACH ONE MEANS

You see	It is a...	Notes
PC-0142 / BC-0007	Client number	One per person, for life. PC = first seen at Platteklouf, BC = at Brackenfell. Used at both branches.
OSB-... / BSB-...	Online booking	OS = Platteklouf, BS = Brackenfell (same for all below).
OSW-... / BSW-...	Walk-in or phone booking	Made in the dashboard.
OSI-0001 / BSI-0001	Invoice	Numbered per branch.
OS-2609-029 / BS-...	Digital gift voucher	Year-month-number. Has a QR code.
HCV-...	Printed (hard-copy) voucher card	Created from an invoice line.
PCF-... / BCF-...	A signed consultation form	A client can have several; the newest is "active".

NEVER RETYPE OR CHANGE A REFERENCE

References are printed on invoices, vouchers and QR codes that clients already hold. If one looks wrong, report it — do not edit it.

A5 WHAT IS LIVE TODAY (2 OCTOBER 2026)

Part	Status	Notes
Website, online booking, vouchers, specials	Live	Both branches. Specials are set per branch.
Dashboard: bookings, invoices, vouchers, report	Live	Part B.
My Profile: email sign-in, visits, client number	Live	Open to every client. Email only, no SMS.
Consultation form	Live	Saved encrypted, PDF copy to the client. Paper forms from Forms .
Client records (Clients)	Live	Real records from bookings and vouchers, both branches.
My Profile link in booking emails and WhatsApp	Live	Send consent form on bookings and walk-ins.
Training site and Help	Live	Help downloads the handbook; Training opens training.orientalspa.co.za.



B

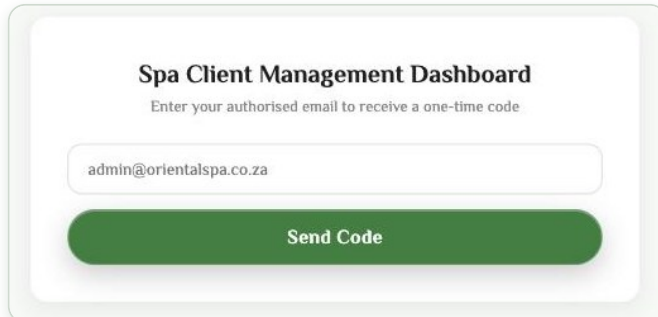
THE RECEPTION DASHBOARD

dashboard.orientalspa.co.za — bookings, walk-ins, calendar, invoices, vouchers, client records and the daily report.

About the pictures. The screenshots come from the real dashboard, but every client name, phone number and email has been replaced with an invented one, and voucher cards are blurred. Therapist names are real — they are staff, not clients.

B1 SIGNING IN

- 1 Open **dashboard.orientalspa.co.za** on the reception computer, tablet or phone.
- 2 Type your work email and tap **Send Code**.
- 3 Open your inbox. Enter the **5-character code** (letters and numbers) and tap **Verify**. The code lasts 10 minutes; asking for a new one cancels the old one.
- 4 You stay signed in on that device, so you will rarely need a code again. One code opens everything — bookings, invoices and vouchers.



Sign-in screen. Enter your work email, then the code from your inbox.

Account	Sees
plattekloof@	Plattekloof only
brackenfell@	Brackenfell only
admin@, jasmin@	Both branches (switch at the top)

NEVER SHARE A CODE

Oriental Spa will never ask you for your code by phone or WhatsApp. If you did not ask for a code, ignore the email and tell the manager.

B2 FINDING YOUR WAY

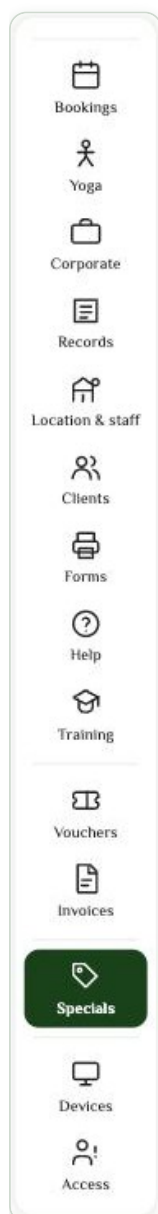


The **top bar**. Who is signed in, the **branch switch** (Platteklloof / Brackenfell — the dark one is the branch you are working on), **Sign out**, **Report a bug / request**, and this month's counts of walk-in, online and phone bookings.

CHECK THE BRANCH FIRST

Everything you see and create belongs to the branch shown in dark green at the top. Before you book or invoice, make sure it is *your* branch. Branch accounts (platteklloof@, brackenfell@) are locked to their own branch.

The menu on the left

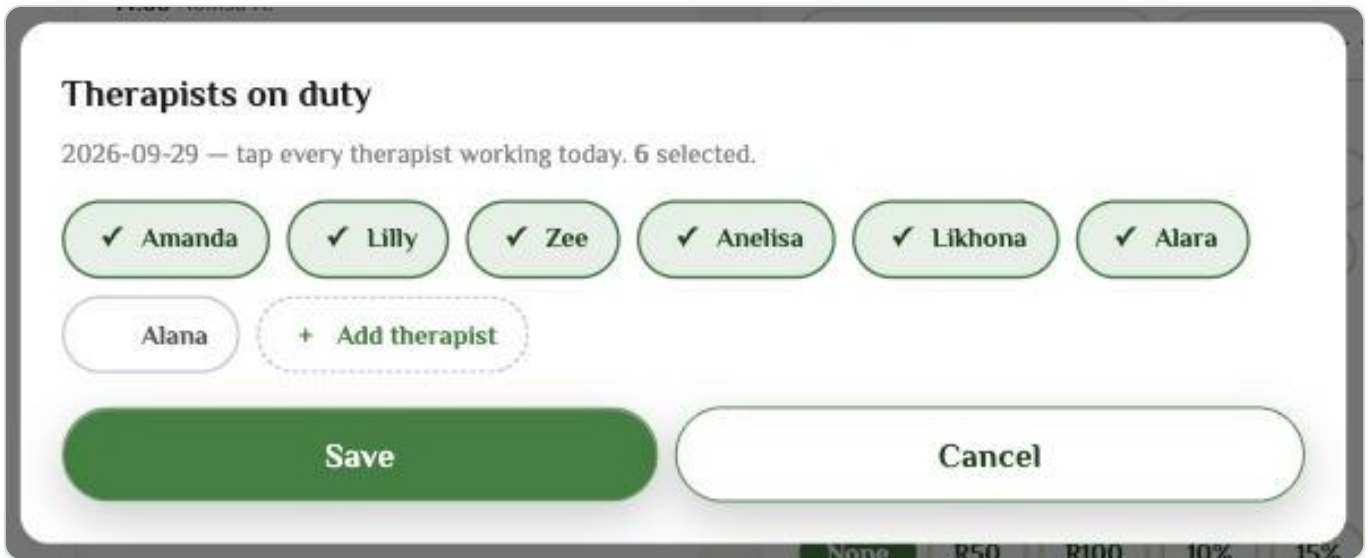


Menu item	What reception uses it for
Bookings	The booking desk: today's sessions, walk-ins, calendar, upcoming web bookings, day settings. You live here.
Yoga, Corporate	Yoga sessions and corporate mobile-spa requests (when you are asked to).
Records	Search every booking; publish the daily report.
Location & staff	Treatment rooms and therapists for the branch.
Clients	Client records and consultation forms. Opens in a new tab, already signed in (section B14).
Forms	Blank consultation forms to print at the spa.
Help	One tap downloads this handbook (PDF).
Training	Opens training.orientalspa.co.za: the training school (LMS, students) and the library of staff guides.
Vouchers	Gift vouchers: approve, confirm payment, issue, send, redeem. Quick voucher.
Invoices	Invoice a client (+ New), send it by WhatsApp or email, record payment. Client list. Redeem a voucher.
Specials, Devices, Access	Management only — leave these alone unless asked.

At the very bottom of every page, **Force refresh** reloads the newest version of the dashboard if something looks out of date.

B3 START OF THE DAY

- 1 Check the branch at the top.
- 2 Tick who is in today. Tap  **On duty**, tick every therapist working, then **Save**. Only therapists on duty can be given bookings.
- 3 Look for bookings to confirm. Open **Upcoming** (section B8) and the **Calendar** (section B7). A red "pending" count means a client booked online and is waiting for you.
- 4 Give every booking a therapist and a room in the *Therapist & room* column (section B4).



Therapists on duty

2026-09-29 — tap every therapist working today. 6 selected.

✓ Amanda ✓ Lilly ✓ Zee ✓ Anelisa ✓ Likhona ✓ Alara

Alana + Add therapist

Save Cancel

None R50 R100 10% 15%

Therapists on duty. Tap a name to tick or untick it. "+ Add therapist" adds someone new to the list.

B4 THE BOOKING DESK

Tap **Bookings**. The desk opens on today; the arrows beside the date move a day back or forward.

The screenshot displays the 'Spa Client Management Dashboard' for a user signed in as 'admin@orientalspa.co.za'. The dashboard includes a top navigation bar with options like 'Platteklouf', 'Brackenfell', 'Sign out', and 'Report a bug / request'. The main interface is divided into several sections:

- Left Sidebar:** Contains icons for 'Bookings', 'Yoga', 'Corporate', 'Records', 'Location & staff', 'Vouchers', 'Invoices', 'New invoice', 'Spa menu', 'Specials', 'Images', 'LMS', 'Students', 'Devices', and 'Access'.
- Top Navigation:** Shows the date '2026/09/29' with arrows for navigation, and buttons for 'On duty (6)', 'Invoice Client', 'Settings', 'Calendar', 'Upcoming', 'Yoga', and 'Phone or Walk-in'.
- SESSONS FOR 2026-09-29:** A section showing a list of sessions. The first session is at 14:11, now in progress, with 1 still to come. It lists 'Priya G.' for a 'Back, Neck & Shoulder Massage (30 min)' in 'Room 5 - Single'. The second session is at 14:00, with 'Nomsa H.' for a 'Grand Opening — 60 min Full ... (60 min)' in 'Room 5 - Single'. There are buttons for 'Finish', 'More ...', 'Start', and 'More ...'.
- THERAPIST & ROOM:** A section for selecting a therapist and room. It shows 'Alara' as the selected therapist and 'Room 5 - Single' as the selected room. There are also options for 'Anelisa' and 'no room'.
- DAY AT A GLANCE:** A section showing a timeline of the day for therapists. It lists 'Alara', 'Anelisa', 'Likhon', and 'Zee'. The timeline shows their availability and booked sessions.
- WALK-IN / PHONE CLIENT:** A section for scheduling a walk-in or phone session. It includes fields for 'Client name', 'TREATMENT' (Thai and Oil Mixed Method Massage), 'DURATION' (60 min, 90 min), 'GUESTS' (1, 2, 3, 4, 5, 6, 7, 8), '2026/09/29', 'South Afr', and 'Phone (WhatsApp) — optional'. It also has buttons for 'Unassigned', 'Amanda', 'Lilly', 'Zee', 'Anelisa', 'Likhona', 'Alara', and 'Alana'. There are also buttons for 'None', 'Room 1 - Single', 'Room 2 - Single', 'Room 3 - Couple', 'Room 4 - Couple', and 'Room 5 - Single'. A 'Start / schedule session' button is at the bottom.

The booking desk. Left: **Sessions** for the day (in progress and still to come; finished ones fold away). Middle: **Therapist & room** — change them with the drop-downs. Bottom: **Day at a glance**, one column per therapist. Right: the **Walk-in / phone client** form.

B5 WALK-IN & PHONE BOOKINGS

Walk-in / phone client form (sample values).

- 1 **Client name** — as they want it on the invoice.
- 2 **Treatment** — start typing, then pick from the list. Choose **60 min** or **90 min**, and the number of **guests**.
- 3 **Date** and the client's **WhatsApp number** (optional, with the country code). This number is how we find the client again.
- 4 **Therapist and Room**. For a couple or group, tap more than one room.
- 5 **Time** — use **-15** / **+15** / **Now**.
- 6 **Commission** if one applies.
- 7 Paying with a voucher? Type the code or tap **Scan**, then **Check**.
- 8 **Send consent form** sends the client the My Profile link on WhatsApp so they can fill in their form while they wait.
- 9 Tap **Add booking**. The booking is saved as **scheduled** — it only goes *in progress* when you press **Start** on it. If the client is already here and the treatment begins now, tick **Start now** first.

CHECK THE GREY BOX

Above the button a summary shows the time, "room free again" and any warning such as *no therapist yet · no room yet*. Fix those before you tap the button.

B6 MANAGING A BOOKING

SESSIONS FOR 2026-09-29

14:11 now · 1 in progress · 1 still to come

Finish More ...

14:00 — Nomsa H. •
Grand Opening — 60 min Full ... (60 min) •
Anelisa **VOUCHER** **WALKIN** [scheduled]
BSW-QSGB7

Start Less :
Approved ✓ **Finish**
Cancel **No show**
Delete
Move to Platteklouf

THERAPIST & ROOM

Alara 1

13:00 Priya G.
Alara Room 5 - Single

Anelisa 1

14:00 Nomsa H.
Anelisa — no room —

A booking card with More ... opened.

Each booking card shows the time, client, treatment, therapist, room and badges (**WEB** online, **PHONE** , **WALKIN** , **VOUCHER**). The main button is the next step; the rest are under More ...

Button	What happens
Approve	Confirms an online booking. Emails the client , with the My Profile link for their consultation form.
Send consent form	Opens WhatsApp with the standard My Profile message for this client. No number on the booking? It asks for one. Choose WhatsApp Web or the app; the computer remembers your choice.
Start	The client is in the room. Needs a therapist first. Nothing starts by itself — every session waits for this button.
Finish	Ends the session (use it if they finish early).
Back to waiting	Pressed Start by mistake? Puts an in-progress session back to scheduled. Press Start again when the client begins.
Cancel	Cancels the booking. Emails the client — you are asked to confirm.
No show	The client did not arrive.
Delete	Removes a booking made by mistake. Use Cancel for real cancellations.
Move to <other branch>	Only for accounts that see both branches. The booking keeps its reference.

When a booking's time arrives a pop-up asks: *Start session · Waiting for client · Reschedule · No show · Delete booking*. After 15 minutes late it also offers *Cancel booking*. **Reschedule** asks for the new date and time and emails the client.

Spa Client Management Dashboard Signed in as admin@orientalspa.co.za Platteloof Brackenfell Sign out Report a bug / request SEPTEMBER Walk-in 25 Online 2 Phone 4

2026/09/29 On duty (6) Invoice Client Settings Calendar Upcoming Yoga Phone or Walk-in

0 pending 0 imminent 0 upcoming + Booking

Available therapists now: 5 of 6 — 2026-09-29

	Likhona	Alara	Zee	Amanda	Lilly	Anelisa
10:00	10:00 Thandiwe M. Grand Opening — 60 min Full Body Massage (60m) • Room 1 - Single					
11:00	11:00 Thandiwe M. Grand Opening — 60 min Deep Cleansing Facial (60m) • Room 1 - Single	11:00 Pieter D. Aromatherapy (60m) • Room 5 - Single				
12:00				11:30 Alsha K. Thai and Oil Mixed Method Massage (60m) • Room 2 - Single		
13:00						
14:00		13:00 Lerato S. Back, Neck & Shoulder Massage (50m) • Room 5 - Single				
15:00	14:00 Johan V. Grand Opening — 60 min Deep Cleansing Facial (60m) • Room 1 - Single					
16:00						
17:00						
18:00						

Back to Oriental Spa Guide Version 9.0.0 Force refresh

Calendar. One column per therapist on duty, a red line for the time now. The counters at the top show **pending** (online bookings to confirm), **imminent** and **upcoming**. Tap a booking to open it; tap an empty slot to book it.

New booking

Tap to choose. Time comes from where you tapped the calendar.

CLIENT NAME

Walk-in

DATE

2026/09/29

TIME

-15

14:19

+15

Now

PHONE (WHATSAPP)

South Afr

optional

NUMBER OF GUESTS

1

2

3

4

5

6

7

8

TREATMENT

60 min Treatment (choice of Full Body or Deep Cleansing Facial or Gel Mani or Pedi)

Thai and Oil Mixed Method

Aromatherapy

Oil

Swedish

Hot Stone Back

Deep Tissue

Thai and Oil Mixed Method Massage

THERAPIST — 6 of 7 free at 14:19

Unassigned

Amanda

Lilly

Zee

Anelisa

Hkhona

Alara

Alana

ROOM — tap more than one for a split party

None

Room 1 - Single

Room 2 - Single

Room 3 - Couple

Room 4 - Couple

Room 5 - Single

COMMISSION

None

R50

R100

10%

15%

20%

Add booking

Cancel

THIS BOOKING

Thai and Oil Mixed Method Massage · 60 min

14:19–15:19 (room free again 15:49)

no therapist yet · no room yet

1 guest

+ Booking. The same fields as the walk-in form: client, date, time, guests, treatment, duration, therapist (only free ones can be tapped), room and commission. The summary bottom-right shows the finish time and any warning. **Add booking** saves it.

CROSSED-OUT NAMES AND ROOMS are already busy at that time. Pick another, or move the time.

Oriental Spa · Staff Handbook · Oct 2026

16 / 38

B8

UPCOMING WEB BOOKINGS

UPCOMING WEB BOOKINGS

Refresh

2026-09-29

16:15 — Ayesha P. • Spring Special (90 min Spa Ex... (90 min) WEB [scheduled] OSB-LWPKC
082 000 0000

Approved ✓ Start Finish Cancel No show Delete Move to Brackenfell

2026-10-03

10:30 — Megan L. • Spring Special (90 min Spa Ex... (90 min) WEB 2 PPL [scheduled] OSB-AVEPW
082 000 0000 — 2 separate rooms please

Approved ✓ Start Finish Cancel No show Delete Move to Brackenfell

Upcoming. Every online booking from today onwards, grouped by date, with the client's number and any note (e.g. "2 separate rooms please").

WEB shows it came from the website; **awaiting confirmation** means you still need to **Approve** it.

- Approve online bookings as soon as you can — the client is waiting for the confirmation email.
- Read the note on each booking; it is the client's own request.
- **Refresh** reloads the list.

B9

DAY SETTINGS

Tap **Settings** on the booking desk (it changes to < **Calendar** to go back). **Most of this is for the manager** — reception mainly uses the therapists-on-duty list.

ONLINE BOOKING

OPEN — clients can book online

Close online booking

2026/09/29

OPEN for online booking

Refresh

NUMBER OF THERAPISTS ON DUTY

6 tick who is in today

✓ Amanda

✓ Lilly

✓ Zee

✓ Anelisa

✓ Likhona

✓ Alara

Alana

+ Add therapist

EDIT AVAILABLE SPA TREATMENT LIST Edit menu →

Thai and Oil Mixed Method Massage

Aromatherapy

Oil Massage

Swedish Massage

Hot Stone Back Massage

Deep Tissue Massage

Back, Neck & Shoulder Massage

Oil Herbal Compress Massage

Head, Back, Neck, Shoulder & Foot Massage

Head and Scalp Massage

4 Hands Full Body Massage

Bamboo Massage Therapy

Express Chair Massage

Sports Massage

Fire Cupping

Full Body Massage & Body Scrub

Express Pedicure / Manicure

Deep Cleansing Facial

Wellness Package — Yoga + Massage Combo

Yoga Group Class

Head, Back, Neck, Shoulder and Foot massage

Corporate Mobile Spa

Traditional Filipino Hilot Massage (Banana Leaf Therapy)

Oriental Fusion

Pregnancy Massage — From 2nd Trimester

Lymphatic Drainage Massage

Express Manicure

Express Manicure — Classic Polish

Express Manicure — Gel Polish

Deluxe Manicure — Classic Polish

Deluxe Manicure — Gel Polish

Gel Overlay + Nail Art

Full Cover Gel Tips — Single Colour

Top of Settings. **Online booking** OPEN/closed for the whole branch; the **date** and whether it is open; **therapists on duty**; the **treatments** clients can book online that day.

Roster these settings forward: Rest of this month Apply

Close this day (holiday / private event)

Day defaults (advance bookings use these) ▼

Bottom of Settings. **Roster these settings forward** copies today's set-up to later days; **Close this day** (holiday or private event); **Day defaults** used for advance bookings.

TWO BUTTONS WITH BIG EFFECTS

Close online booking stops ALL online bookings for the branch until someone re-opens it. **Close this day** stops online bookings for that date only — walk-ins still work. Only use them when the manager asks.

B10 RECORDS & THE DAILY REPORT

Bookings

Yoga

Corporate

Records

Location & staff

Vouchers

Invoices

New invoice

Spa menu

Specials

Images

LMS

Students

Devices

Access

Spa Client Management DashboardSigned in as admin@orientalspa.co.zaPlatteloofBrackenfellSign outReport a bug / requestSEPTEMBERWalk-in 23Online 2Phone 4

FROM2026/08/29

TO2026/09/29

SEARCHref, name, phone, therapist, treatment, roomSearch

Every booking the system has recorded. Tap any row to open it and edit — the same as on the day calendar. Corrections here are the source of truth; use the day's *Re-publish report* afterwards if you need the emailed report and spreadsheet to match.

28 bookings

↓ Sync from Google Drive records

Records up to date — no changes in the sheet.

The owner can tidy completed records in the spreadsheet (therapist, commission, room, status, notes). This pulls those edits back in — you review each change before it's applied. Times and dates are never changed here.

PUBLISH DAILY RECORD (PDF + EMAIL)

REPORT DATE2026/09/29Publish report & email

Rebuilds the PDF from that day's bookings, overwrites the date's rows in the spreadsheet, and emails it to admin@ (cc info@). Use after tidying records above so the emailed report matches.

← Newer

Tue, 29 Sept 2026 (6)

Older →

Day 1 of 3

Tue, 29 Sept 2026 • 6 bookings

10:00Thandiwe M.
Grand Opening — 60 min Full Body Massage • 60m • Likhona • Room 1 - Single

FINISHED

11:00Thandiwe M.
Grand Opening — 60 min Deep Cleansing Facial • 60m • Likhona • Room 1 - Single

FINISHED

11:00Pieter D.
Aromatherapy • 60m • Alara • Room 5 - Single •

FINISHED

11:30Aisha K.
Thai and Oil Mixed Method Massage • 60m • Zee • Room 2 - Single

FINISHED

13:00Lerato S.
Back, Neck & Shoulder Massage • 50m • Alara • Room 5 - Single

FINISHED

14:00Johan V.

Records. Search every booking by date range, name, phone, therapist, treatment or room. Tap a row to open and correct it. **Publish report & email** makes the day's PDF report for the branch you are viewing and emails it to management.

B11 INVOICES

Spa Client Management Dashboard Signed in as admin@orientalspa.co.za **Platteklouf** **Brackenfell** **Sign out** **Report a bug / request** **SEPTEMBER** **Walk-in 43** **Online 27** **Phone 265**

Issued invoices

+ New **Clients**

Search number, client, ref, amount...

All (70) **Created (18)** **Awaiting Payment (2)** **Part-paid (5)** **Overdue (0)** **Paid (50)** **Deleted (5)**

OSI-1253 · Kabelo T. **R400.00**
2026-09-29
AWAITING PAYMENT **PLATTEKLOOF**

OSI-1252 · Chantal B. **R899.00**
2026-09-28
CREATED **PLATTEKLOOF**

OSI-1251 · Zanele Q. **R2500.00**
2026-09-28
CREATED **PART-PAID** **PLATTEKLOOF** **Bal** **R2000.00**

OSI-1250 · Ruan F. **R998.00**
2026-09-26

— pick a saved client — **From contacts**

+ New client **Redeem voucher**

Invoice a student

Make this a Training-school invoice

Click any field on the invoice below to edit it.

INVOICE # OSI-1254

DATE 2026/09/29

BOOKING booking id

VOUCHER voucher ref

BILL TO

Client name

email (optional)

South Afric **phone (for WhatsApp)**

address (optional)

DESCRIPTION	QTY	UNIT	AMOUNT
No line items — add a treatment below.			
+ add a treatment from the menu...			
+ custom line			
+ Hard Copy Voucher			

DRAFT **Generate & Download** **Client Paid — Invoice** **Clear**

ORIENTAL SPA **INVOICE**

ORIENTAL SPA
Tax no: 528297223
www.orientalspa.co.za
Platteklouf: 16 Ave Practice Avenue, Platteklouf 1, Cape Town
Email: info@orientalspa.co.za
Contact: 081 138 1800

BILL TO **INVOICE #** **DRAFT**
INVOICE DATE 2026-09-29

DESCRIPTION	AMOUNT
TOTAL	R0.00

PAYMENT DETAILS
PMT Number: 12345678
Account name: Oriental Spa
Account number: 528297223
Branch Code: 080401
Account Type: Current account
Account For: Your name, business & more
Account For: Your name, business & more
Account For: Your name, business & more

TERMS & CONDITIONS

VOUCHER TERMS & CONDITIONS

Thank you for choosing Oriental Spa.

Payment
To Client: Ruan F. Platteklouf 1, Cape Town
To Client: Ruan F. Platteklouf 1, Cape Town
To Client: Ruan F. Platteklouf 1, Cape Town

Invoices. Left: issued invoices with filters (Created, Awaiting payment, Part-paid, Overdue, Paid). Middle: the invoice you are writing. Right: the live preview, exactly as the client will receive it.

- 1 Tap **+ New**. Choose the client: **pick a saved client**, **From contacts**, or **+ New client**.
- 2 Add treatments with **+ add a treatment from the menu**, or **+ custom line** for anything else.
- 3 Selling a printed gift card? Tap **+ Hard Copy Voucher**. The card codes (HCV-...) are created when the invoice is generated.
- 4 Tap **Generate & Download**. If the client has already paid, use **Client Paid — Invoice** instead — it stamps the invoice **PAID**.
- 5 Open the invoice in the list to **Send on WhatsApp**, **Send by email**, record **Payments** or **Mark fully paid**.

BRANCH

An invoice is numbered for the branch you are viewing: **OSI-...** Platteklouf, **BSI-...** Brackenfell. Check the branch before you start.

B12 VOUCHERS

Spa Client Management Dashboard Signed in as admin@orientalspa.co.za **Platteklouf** **Brackenfell** **Sign out** **Report a bug / request** **SEPTEMBER** **Walk-in 43** **Online 27** **Phone 265**

Active (54) **Pending (6)** **Approved (6)** **Issued (42)** **Archived (14)** **Deleted (17)** **Invoice Client** **Track Invoices** **Scan Voucher** **Settings**

Search name, ref, treatment, or date/month approved (e.g. July)... **Quick voucher** **+ New lot** **From invoice** **Bank details** **Refresh**

« Prev Page 1 of 7 · 54 entries Next » 8 per page

ID	Client	Treatment	Status	Amount
OS-2609-029	Kabelo T. V.	from Ruan F. - Back, Neck & Shoulder	APPROVED	R 450.00
OS-2609-028	Naledi R.	from Naledi R. - Spring Special (90 min Spa Experience)	ISSUED	R 499.00
OS-2609-027	Sipho N.	from Sipho N. - Spring Special (90 min Spa Experience)	ISSUED	R 499.00
OS-2609-025	Ayesha P.	from Ayesha P. - Spring Special (90 min Spa Experience)	ISSUED	R 499.00
OS-2609-024	Megan L.	from Megan L. - Traditional Thai Massage	ISSUED	R 500.00

OS-2609-029 Kabelo T. V. **APPROVED** **R 450.00**

from Ruan F.

Edit **Attach proof** **Confirm paid** **WhatsApp** **Archive** **Mark gift** **Delete** **Delete Test** **Move to Brackenfell**

Not issued yet — this is how the card will look once it is.

Back to Oriental Spa Guide

Vouchers. Filters across the top (Active, Pending, Approved, Issued, Archived, Deleted), search, **Quick voucher**, and the voucher list. Tap a voucher to see its card and buttons (card blurred here).

The life of a voucher bought online

Status	What you do
Pending	A client requested a voucher on the website. Tap Approve : set the amount, expiry and bank account — the client is emailed the bank details.
Approved	Waiting for payment. When the money arrives, tap Confirm paid and choose <i>Client Paid</i> , <i>Spa Gift</i> or <i>Spa Refund Gift</i> . Attach proof if the client sent a proof of payment.
Issued	The voucher is live. Send it with WhatsApp or Send by email , or download the PDF .
Redeemed / Archived	Used, or put away. Nothing to do.

Quick voucher
Instantly issues a voucher (e.g. a rapid refund or goodwill gift) — no approval or proof needed. PDF is generated straight away to share on WhatsApp.

Client name
Sample Client

Client phone (for WhatsApp)
South Africa 66 138 8549

Amount (R) *
500

Treatment
Swedish Massage - 60 min

+ another treatment

Email (optional — also emails the PDF)
client@example.com

☒ It's a gift — hide the amount on the voucher.
Prints "A Gift For You" instead of the price. The amount is still recorded for the spa.

Issue & get voucher

Cancel

Preview

This is the card the client receives. The QR here is a sample — the real one is signed when the voucher is issued.

Quick voucher (sample values). The preview on the right is the exact card the client receives.

Quick voucher

For a voucher the client pays for at the desk, a goodwill gift or a refund. No approval step.

- 1 Tap **Quick voucher**.
- 2 Client name, WhatsApp number, **Amount**, and the treatment(s).
- 3 Email is optional — if you fill it in, the PDF is emailed too.
- 4 **It's a gift** hides the amount on the card ("A Gift For You"). The amount is still recorded.
- 5 Check the preview, then **Issue & get voucher**.

Preview blank? The card design loads from the voucher system, which can be slow. Wait a moment, or change a field to try again.

B13 REDEEMING A VOUCHER

Which voucher is the client holding?
A printed card, or a digital voucher with a QR code.

Redeem hard copyA printed card — enter its HCV code

Redeem digitalTake a voucher off this invoice

Cancel

Invoices → **Redeem voucher**. "Which voucher is the client holding?"

- **Redeem hard copy** — a printed card: type the HCV-... code.
- **Redeem digital** — a voucher on the client's phone: scan its QR code.
- At a booking, you can also enter the voucher code in the walk-in form (section B5).
- A voucher can be used in part; the balance stays on it.

REDEEMING CANNOT BE UNDONE

Check the code, the amount and the client's name before you confirm.

B14 CLIENT RECORDS & CONSULTATION FORMS

Tap **Clients** in the menu. The client records open in a new tab (clients.orientalspa.co.za) and you are signed in automatically; ← **Dashboard** brings you back.

Every client has one record and one **client number** — **PC-####** (first seen at Platteklouf) or **BC-####** (first seen at Brackenfell) — shared by both branches. Clients fill in their consultation form themselves in **My Profile** (myprofile.orientalspa.co.za). Reception reads it here.

Client records (sample data). Search by name, phone or client number. ⚠ marks a form with something the therapist must know. **Open consultation** shows the answers, with **Print / save as PDF** — every opening is logged with your name and the time. **Send consent form via WhatsApp** sends the standard My Profile message. **Edit details** corrects name, mobile or email.

When	What reception does
Booking made by phone or walk-in	Send consent form on the booking, or hand over a paper form (menu → Forms).
Wrong or missing mobile/email	Edit details on the client record. The client number never changes.
Before the treatment	Check the booking for ⚠. Open the consultation only if you need the details.
Client arrives	Go through the answers with them and tap Reviewed with client .
Client changed name or number in My Profile	Approve or decline the change in their record.
Client asks for their data or deletion	Pass it to Jasmin (management). Never delete anything yourself.

The full client side — sign-in, the form, paper forms and privacy rules — is in **Part C**.

B15 END OF THE DAY

- 1 Every session today is **Finished**, **No show** or **Cancelled** — nothing left "in progress".
- 2 Every walk-in and phone client who paid has an **invoice**.
- 3 Tomorrow's online bookings are **approved** (Upcoming).
- 4 If the manager asks, open **Records** and tap **Publish report & email** for today.
- 5 On a shared or personal device, **Sign out**.

B16 WHEN SOMETHING GOES WRONG

What you see	What to do
The code does not arrive	Wait a minute, check spam, then "Resend code". Use the newest email only.
A booking I expect is missing	Check the branch at the top and the date beside the arrows.
"Start" does nothing / greyed out	Give the booking a therapist first (Therapist & room).
A therapist or room is crossed out	They are busy at that time — choose another or change the time.
The page looks old or a button misbehaves	Tap Force refresh at the bottom of the page.
I don't know how to do something	Menu → Help : download this handbook.
Something is still wrong	Tap Report a bug / request at the top, say what you did and what you expected. A screenshot helps.

B17 WHO DOES WHAT

Reception	Management
Bookings, walk-ins, calendar, on-duty list, approving online bookings, consent forms, invoices, vouchers, redeeming.	Opening/closing online booking, day defaults, specials, staff access, the training school (LMS, students). Spa menu prices and website images: ask the web team.

- 1 **Choose the branch first.** A new special runs only at the branch you are viewing — the form says *"Adding to Plattekleof only"* and the button reads *"Add specials at Plattekleof"*.
- 2 To run it at both branches, tick **Make available at both branches** (only accounts that see both branches have this tick).
- 3 Add the flyer, the **Valid until** date and one option per package (name, price, minutes). It appears on the booking page and in the walk-in list straight away, and disappears after the end date.
- 4 Tap **Publish to promo page** to update the website's Promo page. The order on the promo page, the booking page and the walk-in list follows each special's **order number** (lowest first).
- 5 **Extend** moves the end date; **Terminate** ends a special everywhere at once.

Partner offers (Daddy's Deals, Brackenfell). These prepaid deals are in the walk-in treatment list but never on the website, and they are left out of invoices because the client has already paid the partner.



C

MY PROFILE & THE CONSULTATION FORM

myprofile.orientalspa.co.za — how clients sign in, fill in their form and see their visits, and the privacy rules for staff.

C1 THE IDEA IN ONE PAGE

Every client has one profile, one **client number**, and one link: **myprofile.orientalspa.co.za**. There they sign in, fill in or update their consultation form, and see their bookings and visits.

Rule	What it means in practice
One link for everyone	Reception never creates a personal link. The same address goes in every booking email, every WhatsApp and on the QR code at the desk.
The code proves who it is	The client types their email address . We email a 6-digit code to it. There is no SMS. Without that code nobody gets in — not a partner, not a colleague, not someone holding a booking slip.
A phone number is not a password	Many people know a client's number, so a number alone never opens a profile. The client signs in with their email, and the code goes to that inbox.
One profile = one client number	PC-#### if we first met the client at Plattekloof, BC-#### if at Brackenfell. The number never changes and is never reused. Both branches see the same profile.
Health details stay private	Emails to staff never contain health details, only "a form was received for PC-0142". Every time staff open a form it is logged.

WHY THIS DESIGN

An earlier plan had reception generate a personal one-time link for every client. That cost reception time at every booking. With one link and an emailed code, reception does nothing per client and the client is still the only person who can open their form.

C2 THE LINKS

Address	Who uses it	Status
myprofile.orientalspa.co.za	Clients: sign in, profile, visits, consultation form	Live
myprofile.orientalspa.co.za/form	The consultation form, opened from the profile (already filled in with the client's details). Saved encrypted.	Live
myprofile.orientalspa.co.za/?demo=1	A sample profile with invented data — for showing people how it works	Live
dashboard.orientalspa.co.za	Reception and management (bookings, invoices, vouchers)	Live
clients.orientalspa.co.za	Reception: client records and consultation forms. Opened from Clients in the dashboard menu	Live
training.orientalspa.co.za	Staff: this handbook and the guides, plus the training school (LMS, students). Opened from Training in the dashboard menu (Help downloads the handbook directly)	Live

The old address consent.orientalspa.co.za is switched off (2 October 2026). Every link we send points at My Profile. If a client mentions the old address, send them the My Profile link.

Printable forms (for clients who prefer paper)

Blank forms are printed **at the spa**, not by clients: dashboard menu → **Forms**. It offers the massage form, the facial & beauty form, both together, and print-shop files with crop marks.

1 · In the booking email

Every confirmed booking email carries a line: *"Before your visit: your consultation form"* with the My Profile link. It goes out when an online booking is confirmed and when you approve one.

2 · By WhatsApp from reception

For phone bookings and walk-ins, tap **Send consent form** on the booking card or in the walk-in form. A WhatsApp window opens with this message ready (only the name and branch change). If the booking has no number, it asks for one first:

Hello [name], this is Oriental Spa [branch]. Before your visit, please complete (or check) your consultation form in My Profile: <https://myprofile.orientalspa.co.za> — sign in with your email address and we'll email you a code. It takes about four minutes. Thank you!

3 · QR code at the desk

Print the code on the right and place it at reception. A client scans it with their phone camera while they wait.



My Profile

Scan with your phone camera
myprofile.orientalspa.co.za

Walk-in in a hurry? Hand them the paper form (section C9) — it asks the same questions.

The client types their **email address** and taps **Send my code**. Sign-in is by email only: there is no mobile-number option and no SMS.

ORIENTAL SPA
MY PROFILE
YOUR VISITS · YOUR FORMS · YOUR DETAILS

Sign in
No password to remember. We email a one-time code to the address on your profile.

Your email address

you@example.com

Send my code

First time with us? [Create your profile](#)

Just looking? [See a sample profile](#)

ORIENTAL SPA
MY PROFILE
YOUR VISITS · YOUR FORMS · YOUR DETAILS

Check your email

If this is on our client list, we've emailed a 6-digit code to the address on your profile. It expires in 10 minutes.

Enter the 6-digit code

4 8 2 9 1 6 |

Continue

Code expires in 10 minutes · 5 tries.
[Resend code](#) · [Use a different number](#)

Sign in with an email. One field, one button. First-time clients use "Create your profile" underneath.

Enter the 6-digit code. It expires after 10 minutes and allows 5 tries. "Resend code" sends a new one (one a minute).

THE MESSAGE NEVER SAYS WHOSE NUMBER IT IS

The screen always reads *"If this is on our client list, we've emailed a code..."* — whether or not the number belongs to a client. That is deliberate: nobody can use the page to find out who is a client of Oriental Spa. If a client says "it didn't send", check that the email they typed is the one on their profile (section C11).

- A client stays signed in on their own phone for **30 days**. "Sign out" on the profile ends it straight away.
- Opening or updating the health form asks for a **fresh code**, even if they are already signed in — so a borrowed, unlocked phone does not expose it.


ORIENTAL SPA

MY PROFILE

YOUR VISITS · YOUR FORMS · YOUR DETAILS

Welcome back,

Thandiwe M.

YOUR CLIENT NUMBER

PC-0142

Quote it when you book, call or buy a voucher. Welcome at Plattekloof and Brackenfell. Client since Mar 2025.

[Sign out](#)

YOUR NEXT VISIT

OCT

3

Saturday 3 October · 11:00

Swedish Massage · 60 min

Plattekloof · booking OSB-9KWSL

[Reschedule](#) [Book another visit](#)

Client number and next visit. Welcome card with the PC-/BC- number, then the next booking with date, time, treatment, branch and reference.

CONSULTATION FORM

Up to date

Signed 21 Sept 2026 · PCF-2609-7K4Q · Plattekloof

3 notes for your therapist [Hide](#)

- Pregnancy — 24 weeks
- Allergy: nut oils
- Preference: light pressure, avoid abdomen

[Update my form](#) [Download PDF](#)

[Email me a copy](#)

PCF-2503-2H8M · signed 2 Mar 2025 · replaced by your newer form

Health changed, or pregnant, injured or on new medication? Update your form before your visit. Updating saves a new version; the old one is kept until your records expire, 5 years after your last visit.

Consultation form. Status (Up to date / Not yet filled in), notes for the therapist (hidden until tapped), Update, Download PDF, Email me a copy, and older versions.

VISIT HISTORY

14 visits

21 Sept 2026 **Pregnancy Massage · 60 min**
Plattekloof · OSB-7RQ2D

30 Aug 2026 **Deep Cleansing Facial · 60 min**
Brackenfell · BSB-2KD8M

9 Aug 2026 **Swedish Massage · 60 min**
Plattekloof · OSB-5TW9A

12 Jul 2026 **Back, Neck & Shoulder · 30 min**
Plattekloof · OSW-3JX4P

14 Jun 2026 **Hot Stone Back Massage · 45 min**
Plattekloof · OSB-8NCIE

24 May 2026 **Swedish Massage · 60 min**
Plattekloof · OSB-6GH3K

[Show all 14](#)

GIFT VOUCHERS

Aug 2026 **OS-2608-114 · R600**
Redeemed 21 Sep 2026 · Plattekloof

Visit history. Every past visit at both branches with the booking reference. Gift vouchers linked to the client show underneath.

MY DETAILS

[Edit](#)

Name

Thandiwe M. (sample)

Client number

PC-0142

Mobile

+27 82 000 0142

Email

thandiwe.sample@example.com

Date of birth

12/04/1988

Emergency contact

Sipho M. · +27 83 000 0999

Home branch

Plattekloof (where your number was issued)

YOUR PRIVACY

My details and privacy. Name, number, mobile, email, date of birth, emergency contact. Download my data, and Ask to delete my records.

What the client can change

Change	How it is handled
Email	A code is sent to the new address first, to prove it is theirs.
Name or mobile	Held for reception to confirm at the next visit — these are how we find a client's records, so we check it really is them.
Health	"Update my form" saves a new version . The old one is kept (marked "replaced") until the records expire.
Delete	"Ask to delete my records" goes to Oriental Spa Management — Jasmin Tshangana , jasmin@orientalspa.co.za . Invoices are kept for the legal period; everything else, including health forms, is deleted.

Retention: records are kept for **5 years after the client's last visit**, then deleted automatically.

"Update my form" (or "Fill in my form") opens the consultation form with the client's name, mobile, email and date of birth already filled in. The bar at the top confirms whose profile it will save to.

Confirm it's you. Before the health form opens, a fresh code.

Signed in as ... The green bar shows the client number the form saves to. Paper versions are one tap away.

Personal details. Date of birth as dd / mm / yyyy (age appears as they type). Mobile and emergency numbers with country code.

Health & medical history. Tick what applies; some ticks open a "please specify" box.

Facial & beauty sections appear only when a facial, nails, brows or waxing is chosen. A massage-only client never sees them.

Consent & agreement. Treatment and health-information consents are required; offers and news are optional.

logged. We do not sell or share it. We keep it for five years after your last visit, then delete it. You can ask to see or correct it at any time: plattekloof@orientalspa.co.za. Should you wish to have your records deleted, please contact Oriental Spa Management: Jasmin Tshangana at jasmin@orientalspa.co.za.

14 SIGNATURE

Client signature — draw with your finger or mouse **required**



Clear signature

Full name (typed) **required**

Signature. Drawn with a finger, plus the typed name. The date fills itself in.

What the client sees: Thank you — your form is saved to your profile PC-0142 as PCF-2609-8M2X. Your previous form PCF-2609-7K4Q is now marked as replaced. A PDF copy is on its way to your email.

Reception gets: “Updated consultation form for PC-0142 — open it in the dashboard.” No health details in the email.

[← Back to my profile](#)

Saved. The client sees their new form reference; the previous one is marked replaced; a PDF copy goes to their verified email. Reception gets a notice with no health details.

Which form does the client get?

One form adapts to the treatment: the massage questions always, and the facial & beauty questions only when a non-massage treatment is chosen. It follows the two sample forms Jaz supplied (massage; facial & beauty).

Under 18? A parent or guardian section appears automatically once the date of birth shows an age under 18.

ORIENTAL SPA

MY PROFILE

YOUR VISITS · YOUR FORMS · YOUR DETAILS

Create your profile

One profile works at both branches. You'll get your own client number.

Full name

Lindiwe K.

Mobile number (with country code)

South Afr 72 000 0231

Email address — your sign-in codes go here

lindiwe.sample@example.com

Which branch do you usually visit?

Plattekloof Brackenfell

Create your profile. Name, mobile, email and usual branch. The code goes to the email they typed, which proves it is theirs.

ORIENTAL SPA

MY PROFILE

YOUR VISITS · YOUR FORMS · YOUR DETAILS

Welcome, **Lindiwe K.** [Sign out](#)

YOUR CLIENT NUMBER

BC-0231

Quote it when you book, call or buy a voucher. Welcome at Plattekloof and Brackenfell.

CONSULTATION FORM [Not yet filled in](#)

Please complete your consultation form before your first treatment. It takes about four minutes.

[Fill in my form](#)

New client number. Issued straight away (BC- for Brackenfell, PC- for Plattekloof), with a prompt to fill in the form.

Good to know

- If the mobile number already has a profile, the client is **linked to it** instead of getting a second one. If the email on file is different, reception confirms first.
- A client first seen at Plattekloof keeps their **PC-** number when they visit Brackenfell. The prefix records where we first met them — nothing else.
- A client we already know by phone but who has **no email on file** uses "Create your profile" with the same mobile number: the profile is linked to their existing record and visits.

Tap **Clients** in the dashboard menu. Client records open in a new tab (clients.orientalspa.co.za), already signed in; ← **Dashboard** at the top takes you back. Search by name, phone or client number (screens shown with sample data).

ORIENTAL SPA Client records Plattekloof Brackenfell Signed in as reception (sample)

Search name, phone or client ID (PC-/BC-)

Filters: All, Needs attention, No form yet, Access log

Client List:

- Thandiwe M. (sample)** (Needs attention)
 - PC-0142 · 082 000 0142 · Plattekloof
 - form 2026-09-21
- Pieter D. (sample)**
 - PC-0051 · 072 000 0051 · Plattekloof
 - no form
- Aisha K. (sample)**
 - PC-0388 · 084 000 0388 · Plattekloof
 - form 2026-08-30
- Naledi R. (sample)**
 - PC-0203 · 076 000 0203 · Plattekloof
 - form due for deletion
- Lerato S. (sample)** (Needs attention)
 - BC-0011 · 071 000 0011 · Brackenfell
 - form 2026-09-28

Thandiwe M. (sample) Profile:

PC-0142 · first seen at Plattekloof · 14 visits · last 2026-09-21

MOBILE: 082 000 0142 **EMAIL:** thandiwe.sample@example.com

DATE OF BIRTH: 1988-04-12 **CONSULTATION:** form 2026-09-21

Consultation & consent

Health details are private. Opening this record is logged with your name and the time.

Buttons: Open consultation PCF-2609-7K4Q, Send form via WhatsApp, Reviewed with client, Withdraw / delete (admin)

Preview: opens WhatsApp to 082 000 0142 with our standard message and the My Profile link (myprofile.orientalspa.co.za). Same link for every client — they sign in with a code emailed to them, so nothing is generated per client. Try it: myprofile.orientalspa.co.za

Bookings: 2026-09-21 14:00 - Pregnancy Massage 60 min - Plattekloof

Client records. Left: the client list with filters (△ Needs attention, No form yet, Access log). Right: the profile — contact details, the consultation status, "Open consultation" (logged), "Send consent form via WhatsApp", "Edit details", "Reviewed with client", and the client's bookings.

Reception, step by step

- 1 **Before the treatment**, look for ⚠ on the booking. It means the form has something the therapist must know (pregnancy, allergy, recent surgery, blood pressure...). The calendar only shows the ⚠ — the details open in the client's profile.
- 2 **Open the consultation** only when you need it. Every opening records your name and the time.
- 3 **No form yet?** Tap **Send consent form via WhatsApp** (the standard My Profile message) or hand over a paper form.
- 4 **Contact details wrong?** **Edit details** on the client record. The client number never changes, and a mobile number that already belongs to another client is refused.
- 5 **On arrival**, check the answers with the client and tap **"Reviewed with client"**.
- 6 **Name or number changed?** Approve or decline the change the client asked for in their profile.
- 7 **Client asks for their records or deletion?** Pass it to Jasmin (admin). Do not delete anything yourself.

ORIENTAL SPA Client records Plattelkloof Brackenfell Signed in as reception (sample)

Search name, phone or client ID (PC-/BC-)

All ⚠ Needs attention No form yet Access log

Thandiwe M. (sample) ⚠
PC-0142 · 082 000 0142 · Plattelkloof
form 2026-09-21

Pieter D. (sample)
PC-0051 · 072 000 0051 · Plattelkloof
no form

Alsha K. (sample)
PC-0388 · 084 000 0388 · Plattelkloof
form 2026-08-30

Thandiwe M. (sample)
PC-0142 · first seen at Plattelkloof · 14 visits · last 2026-09-21
MOBILE: 082 000 0142 EMAIL: thandiwe.sample@example.com
DATE OF BIRTH: 1988-04-12 CONSULTATION: form 2026-09-21

Consultation & consent
Health details are private. Opening this record is logged with your name and the time.
Open consultation PCF-2609-7K4Q

Send form via WhatsApp Reviewed with client Withdraw / delete (admin)

Profile with ⚠. Health details stay behind "Open consultation".

ORIENTAL SPA Client records Plattelkloof Brackenfell Signed in as reception (sample)

Search name, phone or client ID (PC-/BC-)

All ⚠ Needs attention No form yet Access log

Choose a client on the left.

Thandiwe M. (sample) ⚠
PC-0142 · 082 000 0142 · Plattelkloof
form 2026-09-21

Pieter D. (sample)
PC-0051 · 072 000 0051 · Plattelkloof
no form

Alsha K. (sample)
PC-0388 · 084 000 0388 · Plattelkloof
form 2026-08-30

Filters. "Needs attention" lists every client with a ⚠; "Access log" shows who opened which record.

C9 PAPER FORMS

Printed A4 forms ask the same questions, in the same order. Use them for walk-ins, clients without a smartphone or email, or when the internet is down. Print them from **Forms** in the dashboard menu.

ORIENTAL SPA
CLIENT CONSULTATION FORM
MESSAGE YOUR WELLNESS OUR CARE

Branch: ☐ Platford ☐ Blackwell Date: ____/____/____ Treatment booked: ____

1 PERSONAL DETAILS
Full name: _____
Date of birth: ____/____/____ Age: ____ Female ☐ Male ☐ Other ☐
Mobile number: +_____ Email address: _____
Address: _____
Emergency contact - name: _____ Number: +_____

2 HEALTH & MEDICAL HISTORY
Do you have, or have you had, any of the following? (tick all that apply) Is this your first visit to Oriental Spa? ☐ Yes ☐ No

☐ Allergies - specify _____ ☐ Asthma ☐ Epilepsy
☐ Diabetes ☐ High / low blood pressure ☐ Heart conditions / pacemaker
☐ Head aches / dizziness ☐ Nausea/vom ☐ Cancer - specify _____
☐ Recent surgery - specify _____ ☐ Joint problems ☐ Arthritis
☐ Osteoporosis ☐ Stroke / back problems ☐ Nerve damage
☐ Skin conditions (e.g. eczema, psoriasis) ☐ Respiratory problems ☐ Pregnancy - weeks _____
☐ Breastfeeding ☐ Menstrual conditions ☐ Other - specify _____

If you ticked any of the above, please give details: _____

3 MEDICATION
Are you currently taking any medication? ☐ No ☐ Yes Please specify _____
Have you taken any painkillers or medication today? ☐ No ☐ Yes Please specify _____

4 LIFESTYLE & WELLNESS
What is your main occupation? ☐ Desk / computer work ☐ Physical activities ☐ Travel ☐ Other _____
How often do you exercise? ☐ Daily ☐ Weekly ☐ When was your last massage? ____/____/____

5 BODY CONCERNS
☐ Muscle tension ☐ Aches / pains ☐ Dry skin ☐ Cellulite
☐ Poor circulation ☐ Swelling (e.g. legs / feet) ☐ Stress ☐ Other _____

PLATFORD 18 The Grange Avenue, Platford 1, Leamington, CV35 9JH BRACKNELL 18 The Grange Avenue, Platford 1, Leamington, CV35 9JH
01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000

Message — page 1

ORIENTAL SPA
CLIENT CONSULTATION FORM - CONTINUED

6 MESSAGE PREFERENCES
What type of massage would you prefer today? (you can tick more than one)
☐ Oil / Swedish ☐ Deep tissue ☐ Thai / all round
☐ Back, neck & shoulder ☐ Hot stone ☐ Thai foot reflexology
☐ Myofascial release ☐ Other _____
Pressure you prefer:
☐ Light Gentle, relaxing touch ☐ Medium Balanced pressure ☐ Firm Deep, for tension relief ☐ Deep Strong, for muscle knots

7 FOCUS AREAS Tick all that apply
☐ Back, neck & shoulders ☐ Legs ☐ Arms
☐ Hands & feet ☐ Stomach / head ☐ Areas to avoid _____

8 WHAT WOULD YOU LIKE TO ACHIEVE TODAY?
☐ Relaxation ☐ Stress relief ☐ Pain relief ☐ Improve circulation
☐ Better sleep ☐ Muscle recovery ☐ Other _____

9 CONSENT & AGREEMENT
☐ I have provided accurate information about my health, medical history and preferences. I understand that it is my responsibility to inform my therapist of any changes to the above information. I give my consent for the treatment to be carried out by the therapist at Oriental Spa.
☐ I understand the treatment may be adjusted or declined if it is not safe for me, and that spa treatments are for relaxation and wellbeing - not a substitute for medical care.
☐ My health information: I consent to Oriental Spa keeping the health information on this form so therapists at both branches can treat me safely.
☐ Offers and news by email or WhatsApp (optional) - you can say no and still be treated.
Your privacy: Oriental Spa (Pty) Ltd collects this information to treat you safely. Only our reception team and therapists can see it, through our secure booking system, and even then we never access your records to logbook. We do not sell or share it. We keep it for five years after your last visit. Don't worry! You can ask us to not collect it at the branch email below. Should you wish to have your records deleted, please contact Oriental Spa Management (James Tillingdale at james@orientalspa.co.uk).

Client signature: _____ Date: ____/____/____
Therapist signature: _____ Date: ____/____/____
If the client is under 18: Parent / guardian name: _____ Relationship: _____ Signature: _____

OFFICE USE
Client ID (PCT-RCT): _____ Consent ref (PCT-RCT): _____ Captured on dashboard by: _____

PLATFORD 18 The Grange Avenue, Platford 1, Leamington, CV35 9JH BRACKNELL 18 The Grange Avenue, Platford 1, Leamington, CV35 9JH
01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000

Message — page 2

ORIENTAL SPA
FACIAL & BEAUTY TREATMENT CONSULTATION FORM
YOUR SKIN YOUR BEAUTY OUR CARE

Branch: ☐ Platford ☐ Blackwell Date: ____/____/____ Treatment booked: ____

1 PERSONAL DETAILS
Full name: _____
Date of birth: ____/____/____ Age: ____ Female ☐ Male ☐ Other ☐
Mobile number: +_____ Email address: _____
Address: _____
Emergency contact - name: _____ Number: +_____

2 HEALTH & MEDICAL HISTORY
Do you have, or have you had, any of the following? (tick all that apply) Is this your first visit to Oriental Spa? ☐ Yes ☐ No

☐ Allergies - specify _____ ☐ Asthma ☐ Epilepsy
☐ Diabetes ☐ High / low blood pressure ☐ Heart conditions / pacemaker
☐ Head aches / dizziness ☐ Nausea/vom ☐ Cancer - specify _____
☐ Recent surgery - specify _____ ☐ Joint problems ☐ Arthritis
☐ Osteoporosis ☐ Stroke / back problems ☐ Nerve damage
☐ Skin conditions (e.g. eczema, psoriasis) ☐ Respiratory problems ☐ Pregnancy - weeks _____
☐ Breastfeeding ☐ Menstrual conditions ☐ Hormonal imbalance
☐ Autoimmune disease ☐ Kidney scarring ☐ Currently under a doctor's care

If you ticked any of the above, please give details: _____

3 MEDICATION
Are you currently taking any medication? ☐ No ☐ Yes Please specify _____
Have you taken any painkillers or medication today? ☐ No ☐ Yes Please specify _____

4 LIFESTYLE & SKINCARE HABITS
What is your main occupation? ☐ Desk / computer work ☐ Physical activities ☐ Travel ☐ Other _____
How often do you exercise? ☐ Regularly ☐ Sometimes ☐ Rarely ☐ Never
Do you smoke? ☐ Yes ☐ No Do you drink alcohol? ☐ Yes ☐ No
How much water do you drink a day? ☐ Less than 1L ☐ 1-2L ☐ More than 2L
Do you use any skincare products? ☐ No ☐ Yes Which? _____

PLATFORD 18 The Grange Avenue, Platford 1, Leamington, CV35 9JH BRACKNELL 18 The Grange Avenue, Platford 1, Leamington, CV35 9JH
01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000 01926 884000

Facial & beauty — page 1

PAPER IS HEALTH INFORMATION TOO

File completed forms in the locked cabinet, never on the desk. Where possible, ask the client to fill in the form in My Profile at their next visit so it is stored digitally.

C10 PRIVACY RULES FOR STAFF (POPIA)

Do	Don't
Open a consultation only for a client you are serving today.	Browse other clients' health notes out of interest — every opening is logged.
Send the standard My Profile link.	Send health details by WhatsApp or email, or photograph a form.
Ask the client to update their form when their health has changed.	Fill in or change a client's health answers yourself.
Pass access and deletion requests to Jasmin.	Promise a client that something is deleted.
Lock your screen when you step away from the desk.	Share your dashboard sign-in code with anyone.

C11 WHEN SOMETHING GOES WRONG

The client says...	What to do
"I didn't get a code."	Ask them to check spam/promotions and wait a minute before "Resend code". Then check the email on their profile in the dashboard — a typo or an old address is the usual cause. Correct it, and they try again.
"We have no email for this client."	Add their email with Edit details on their client record, or let them tap "Create your profile" with their mobile number and email — it links to their existing record.
"The code doesn't work."	Codes last 10 minutes and are single-use; after 5 wrong tries the code is cancelled. Use the newest email only.
"I changed my phone number."	Nothing changes for sign-in (it is by email). Update the number with Edit details on their client record.
"Someone else is using my number."	A number cannot open a profile — only the client's own email can. Flag it to Jasmin.
"It says 'being switched on'."	The server was being updated. Try again in a few minutes.

C12 WHAT IS LIVE TODAY (2 OCT 2026)

Part	Status	Notes
Sign-in by email + emailed code	Live	Open to every client. No SMS.
Profile: client number, next visit, visit history	Live	Read from the real bookings and client records.
Consultation form (fill in, sign, save)	Live	Saved encrypted; a PDF copy is emailed to the client; "Email me a copy" sends it again.
Client records for reception	Live	Dashboard menu → Clients . Every opening of a form is logged.
My Profile link in booking emails and WhatsApp	Live	Send consent form on booking cards and the walk-in form.
SMS codes	Not planned	Parked: SMS costs per message. Email only.

FOR MANAGEMENT

Setting `PROFILE_OPEN` to `false` closes My Profile to everyone except the testers listed in `PROFILE_TESTERS` — the emergency brake if something goes wrong.