

A dark, moody photograph of a person from the side, wearing a dark cap and headphones, looking down at a laptop screen. The scene is dimly lit, with the laptop screen being the primary light source.

# Customer service representative/Appointment setter (Entry Level) portfolio

Neo Tsofela

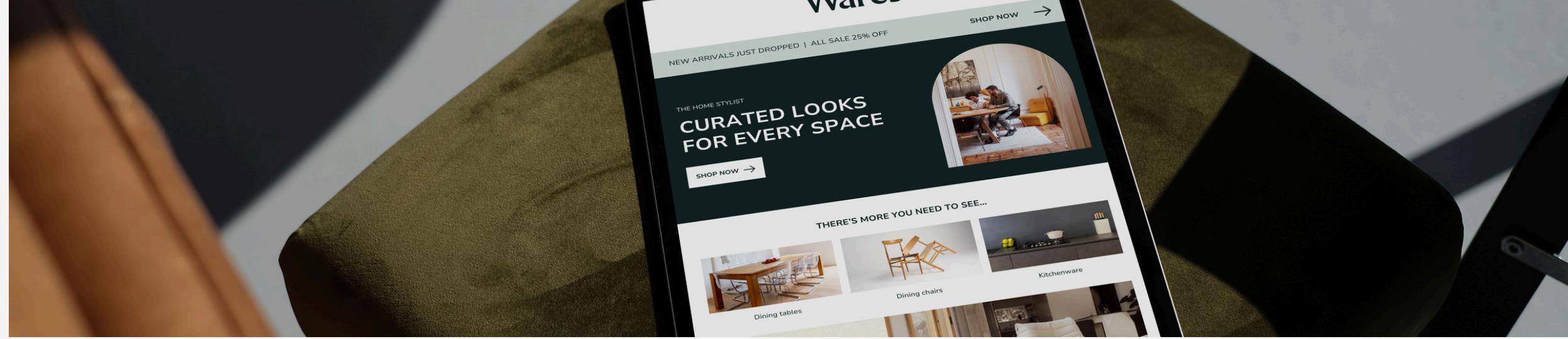
dineotsofela@gmail.com

+27678455149

# hello, i'm Neo Tsofela!



I am a dedicated professional with over four years of remote experience teaching English online. Driven to pivot into customer service and appointment booking, I have proactively taught myself and honed my skills in CRM platforms such as Salesforce, HubSpot, as well as scheduling tools like Calendly. Through this self-directed learning, I have developed proficiency in lead engagement, case management, data entry, and appointment setting, positioning myself to contribute effectively as a first point of contact for clients. I am eager to expand my expertise through a hands-on experience, positively represent a company, and deliver efficiency and results with my "get it done" mindset while growing alongside the organization.



# skills and expertise

## 1. Lead Engagement

**Ability to capture, qualify, and convert leads into accounts/contacts, ensuring smooth pipeline management.**

## 2. Case Management

**Skilled at creating, prioritizing, and resolving cases, with escalation workflows and SLA awareness.**



## 3. Data Entry

**Accurate and efficient record creation, updates, and maintenance across CRM systems.**

## 4. Appointment Setting

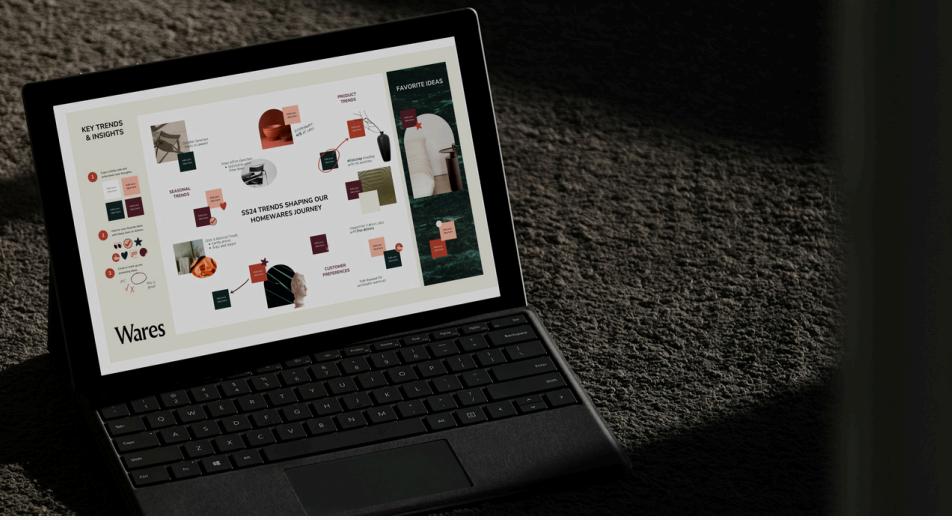
**Experienced in scheduling demos, meetings, and follow-ups, linking them to accounts and contacts.**

## 5. CRM Proficiency

**End-to-end workflow: leads, accounts, contacts, cases, tasks, calendar events, and Slack integration.**



# my work experience



## CRM & Customer Service Simulation Projects (Portfolio Work) Independent Practice

- Salesforce: Created and managed leads, accounts, contacts, cases, tasks, and calendar events; documented workflows with Slack updates; demonstrated SLA-based prioritization and escalation.
- HubSpot: Added and linked contacts to companies, communicated with clients via CRM, created and prioritized tasks, scheduled meetings, and updated company records.
- Calendly: Scheduled demos, negotiation meetings, and client pitch calls; integrated with CRM records for seamless workflow.
- Developed realistic case studies (billing issues, password resets, demos, negotiations) to demonstrate end-to-end customer lifecycle management.

salesforce



salesforce

# First project

Mock Salesforce Tasks

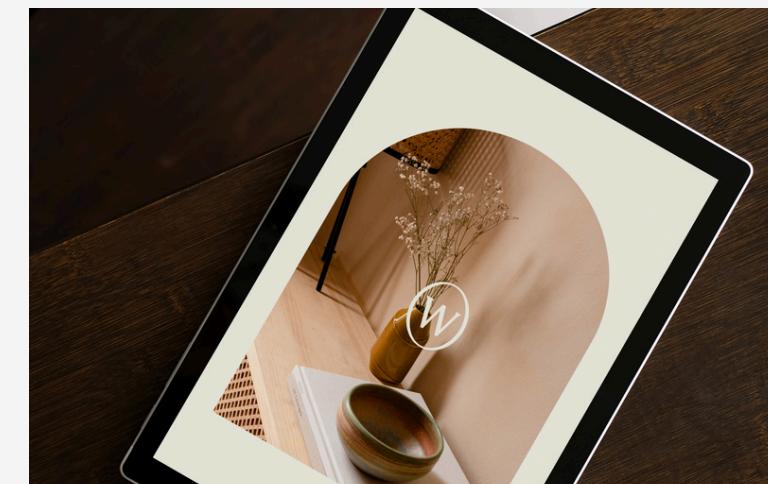
# Mock Salesforce Project: Customer Service Workflow Simulation



## Scenario:

I am simulating the customer journey for a fictional company called **Momentum Marketing**. The company provides digital marketing services and wants to track leads, accounts, contacts, cases, tasks, and calendar events in Salesforce.

I'll demonstrate how I manage the entire workflow.



**Neo Tsofela**

dineotsofela@gmail.com

+27678455149

# 1. Leads Management: Create 4 new leads

## Creating new lead: Sarah Lee

The screenshot shows the 'About' section of a lead creation form. The fields filled are:

- Name: Ms. Sarah Lee
- Last Name: Lee
- Company: GreenWave Startups
- Title: Founder and CEO
- Website: www.greenwave.co

At the bottom right of the form are three buttons: 'Cancel', 'Save & New', and 'Save'. The status bar at the bottom indicates 'Contacted'.

Sarah Lee added to the CRM

The screenshot shows the Lead detail page for Ms. Sarah Lee. The lead status is listed as 'New'. The 'About' section displays the following information:

- Name: Ms. Sarah Lee
- Company: GreenWave Startups
- Title: Founder and CEO
- Website: www.greenwave.co

On the right side, there are tabs for 'Upcoming & Overdue' and 'No activities to show.' A 'Slack Channel' sidebar is visible on the right.

## Creating new lead: David Johnson

The screenshot shows the 'About' section of a lead creation form. The fields filled are:

- Name: Mr. David Johnson
- Last Name: Johnson
- Company: Horizon Retail Group
- Title: Operations Director
- Website: www.horizonretail.com

At the bottom right of the form are three buttons: 'Cancel', 'Save & New', and 'Save'. The status bar at the bottom indicates 'Contacted'.

David Johnson added to the CRM

The screenshot shows the Lead detail page for Mr. David Johnson. The lead status is listed as 'New'. The 'About' section displays the following information:

- Name: Mr. David Johnson
- Company: Horizon Retail Group
- Title: Operations Director
- Website: www.horizonretail.com

On the right side, there are tabs for 'Upcoming & Overdue' and 'No activities to show.' A 'Slack Channel' sidebar is visible on the right.

# 1. Leads Management: Create 4 new leads

## Creating new lead: Emily Cater

The screenshot shows the Salesforce Leads creation page. The 'About' tab is selected, displaying fields for Name, Salutation, First Name, Last Name, Company, Title, and Website. The Name field contains 'Emily Cater' from BrightFuture Academy. The 'Save' button is highlighted in blue.

Lead Details:

- Name: Emily Cater
- Salutation: Ms.
- First Name: Emily
- Last Name: Cater
- Company: BrightFuture Academy
- Title: Academic Coordinator
- Website: www.brightfuture.edu

Emily Cater added to CRM

The screenshot shows the Salesforce Leads detail page for 'Ms. Emily Cater'. The lead status is 'New'. The 'About' section displays the same information as the creation page. A 'Slack Channel' sidebar is visible on the right.

Lead Details:

- Name: Ms. Emily Cater
- Company: BrightFuture Academy
- Title: Academic Coordinator
- Website: www.brightfuture.edu

## Creating new lead: Michael Brown

The screenshot shows the Salesforce Leads creation page. The 'About' tab is selected, displaying fields for Name, Salutation, First Name, Last Name, Company, Title, and Website. The Name field contains 'Michael Brown' from SolarEdge Solutions. The 'Save' button is highlighted in blue.

Lead Details:

- Name: Michael Brown
- Salutation: Mr.
- First Name: Michael
- Last Name: Brown
- Company: SolarEdge Solutions
- Title: Business Development
- Website: www.soledge-solutions.com

Michael Brown added to CRM

The screenshot shows the Salesforce Leads detail page for 'Mr. Michael Brown'. The lead status is 'New'. The 'About' section displays the same information as the creation page. A 'Slack Channel' sidebar is visible on the right.

Lead Details:

- Name: Mr. Michael Brown
- Company: SolarEdge Solutions
- Title: Business Development
- Website: www.soledge-solutions.com

## 2. Leads Management: Update lead statuses as they move through the pipeline

### Updated lead status through the pipeline

Lead Ms. Sarah Lee

Status: Unqualified → Converted

About

- Name: Ms. Sarah Lee
- Company: GreenWave Startups
- Title: Founder and CEO
- Website: www.greenwave.co

Slack Channel

Upcoming & Overdue

No activities to show.

Lead converted

ACCOUNT

CONTACT

OPPORTUNITY

GreenWave Startups

Sarah Lee

GreenWave Startups

### Updated lead status through the pipeline

Lead Mr. David Johnson

Status: Unqualified → Converted

About

- Name: Mr. David Johnson
- Company: Horizon Retail Group
- Title: Operations Director
- Website: www.horizonretail.com

Slack Channel

Upcoming & Overdue

Schedule a meeting for Mr. David Johnson

Lead converted

ACCOUNT

CONTACT

OPPORTUNITY

Horizon Retail Group

David Johnson

Horizon Retail Group

## 2. Leads Management: Update lead statuses as they move through the pipeline

### Updated lead status through the pipeline

The screenshot shows a CRM interface for a lead named Ms. Emily Cater. The top navigation bar includes links for Sales, Leads, Contacts, Accounts, Opportunities, Products, Price Books, Calendar, Analytics, and more. The Leads tab is selected. On the left, there is a sidebar with icons for Home, Contacts, Accounts, Sales, Service, Marketing, and Your Account. The main content area displays the lead's details, including an 'About' section with fields for Name, Company, Title, and Website. Below this is a pipeline status bar with stages: Unqualified (green), Converted (dark blue), and Select Converted Status (light blue). To the right of the pipeline is a Slack Channel integration window titled 'Slack Channel'. At the bottom, there is a 'To Do List' section.

### Lead converted

The screenshot shows the same CRM interface after the lead has been converted. The pipeline status bar now shows the 'Converted' stage. The main content area is divided into three sections: ACCOUNT, CONTACT, and OPPORTUNITY. The ACCOUNT section shows BrightFuture Academy with details like Name, Phone, Website, and Industry. The CONTACT section shows Emily Cater with details like Title, Phone, Email, and Industry. The OPPORTUNITY section shows a new opportunity for BrightFuture Academy with details like Close Date, Amount, and Opportunity Owner. A large orange flag icon with a person icon is prominently displayed above the contact information.

### Updated lead status through the pipeline

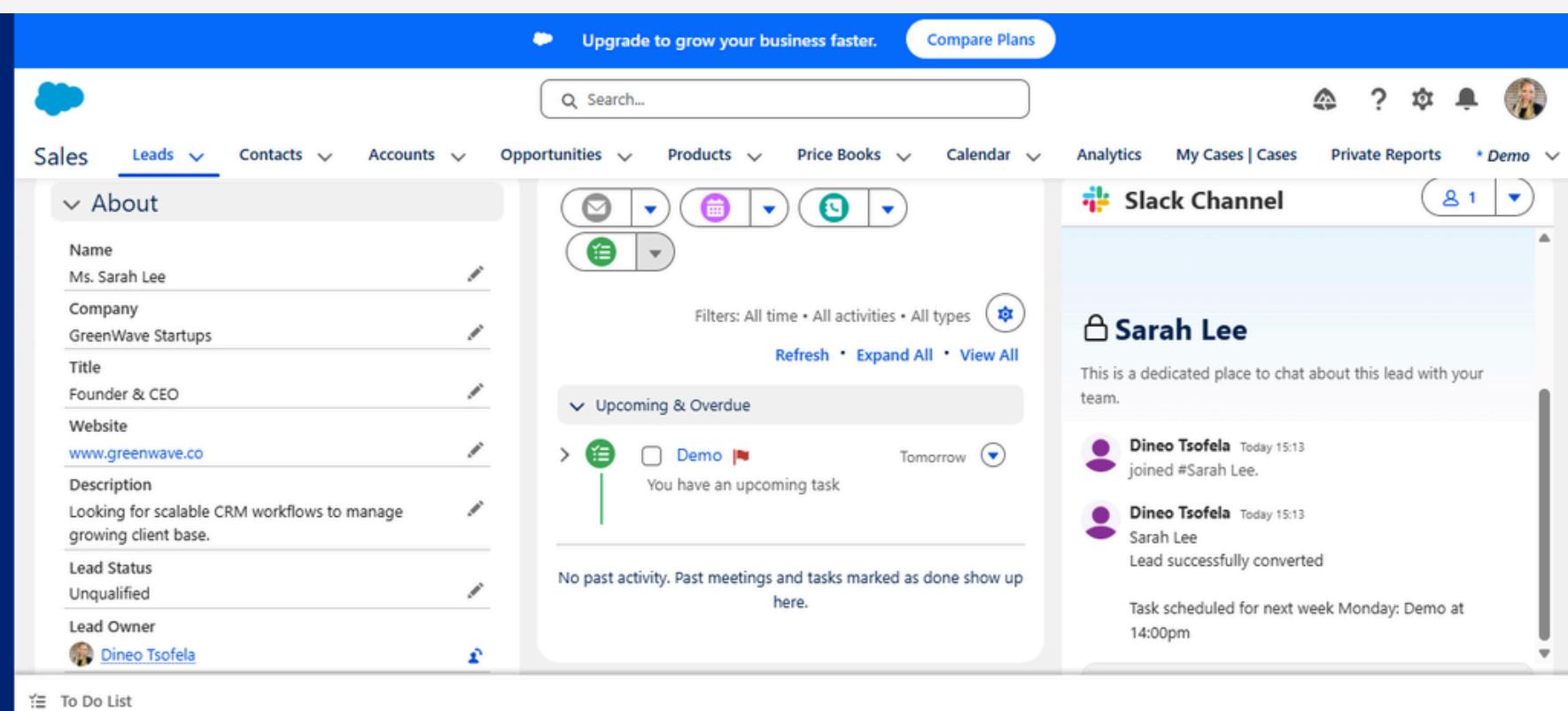
This screenshot shows a CRM interface for a lead named Mr. Michael Brown. The layout is similar to the first one, with a sidebar and a main content area. The lead's details are shown, along with a pipeline status bar indicating the 'Unqualified' stage. Below the pipeline is a Slack Channel integration window. A message at the bottom encourages users to start sending emails and scheduling tasks.

### Lead converted

This screenshot shows the CRM interface after the lead Mr. Michael Brown has been converted. The pipeline status bar now shows the 'Converted' stage. The main content area is divided into ACCOUNT, CONTACT, and OPPORTUNITY sections. The ACCOUNT section shows SolarEdge Solutions with details like Name, Phone, Website, and Industry. The CONTACT section shows Michael Brown with details like Title, Phone, Email, and Industry. The OPPORTUNITY section shows a new opportunity for SolarEdge Solutions with details like Close Date, Amount, and Opportunity Owner. A large orange flag icon with a person icon is prominently displayed above the contact information.

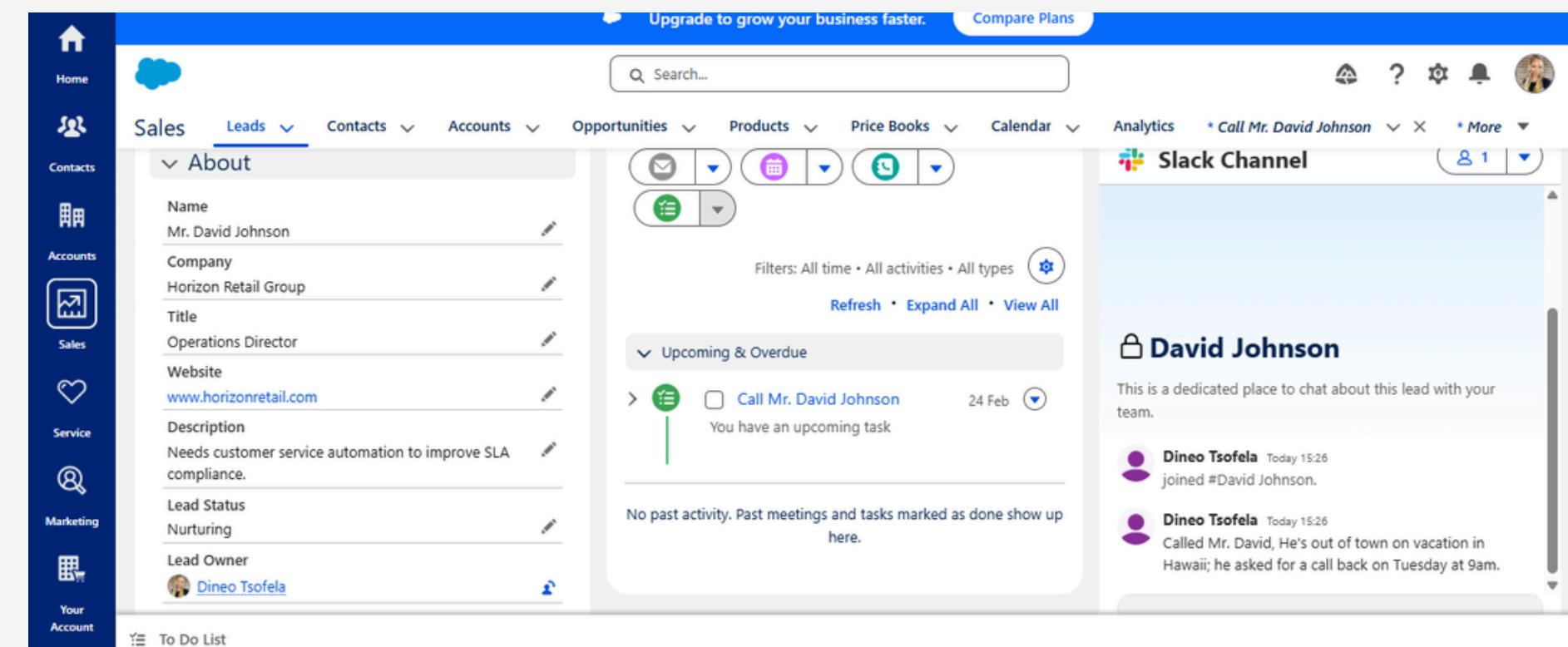
### 3. Leads Management: Interaction in Slack for each lead

#### Slack update for lead: Sarah Lee



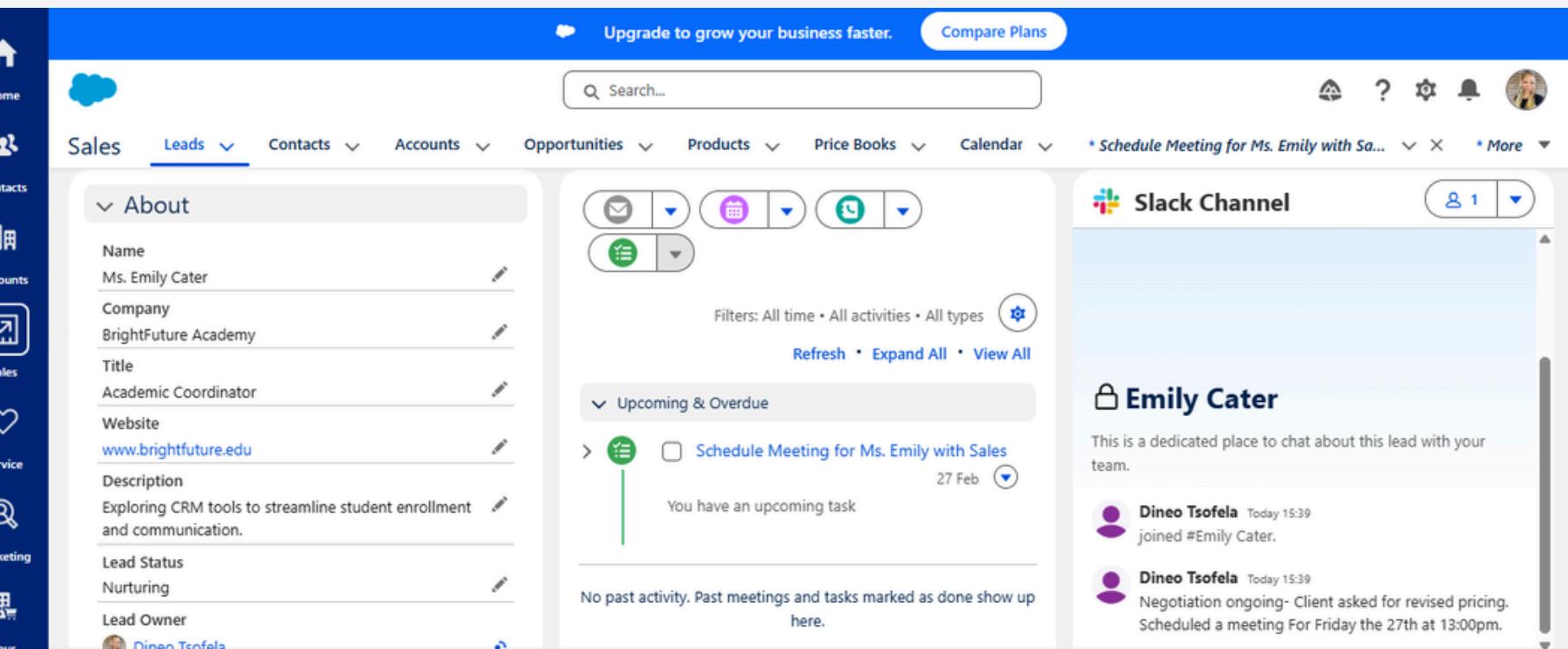
The screenshot shows the Salesforce Lead Detail page for Ms. Sarah Lee. The left sidebar includes Sales, Leads, Contacts, Accounts, Opportunities, Products, Price Books, Calendar, Analytics, My Cases, Private Reports, and Demo. The main content area displays the lead's details: Name (Ms. Sarah Lee), Company (GreenWave Startups), Title (Founder & CEO), Website (www.greenwave.co), Description (Looking for scalable CRM workflows to manage growing client base.), Lead Status (Unqualified), and Lead Owner (Dineo Tsafela). Below the lead details is a "Slack Channel" section titled "Sarah Lee". It shows a message from Dineo Tsafela: "joined #Sarah Lee." and a note: "You have an upcoming task". The "Upcoming & Overdue" section shows a task for "Demo" scheduled for tomorrow at 14:00pm.

#### Slack update for lead: David Johnson



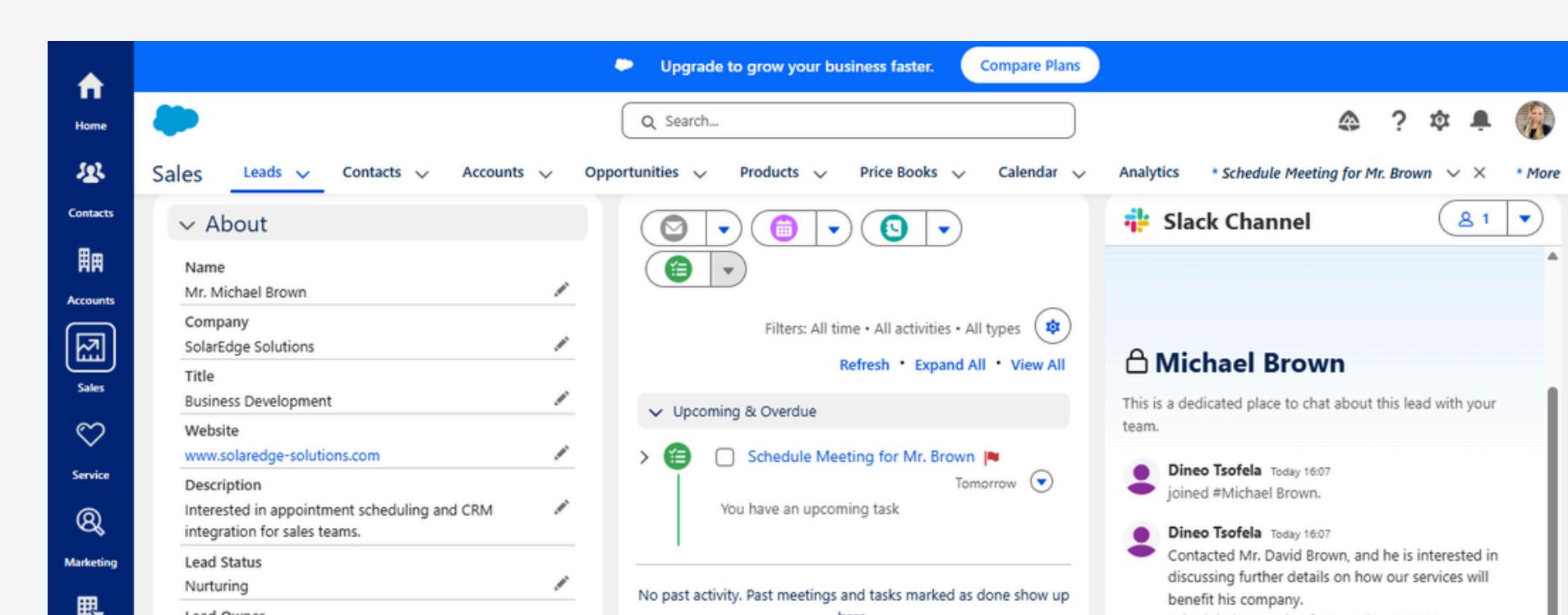
The screenshot shows the Salesforce Lead Detail page for Mr. David Johnson. The left sidebar includes Sales, Leads, Contacts, Accounts, Opportunities, Products, Price Books, Calendar, Analytics, Call Mr. David Johnson, and More. The main content area displays the lead's details: Name (Mr. David Johnson), Company (Horizon Retail Group), Title (Operations Director), Website (www.horizonretail.com), Description (Needs customer service automation to improve SLA compliance.), Lead Status (Nurturing), and Lead Owner (Dineo Tsafela). Below the lead details is a "Slack Channel" section titled "David Johnson". It shows a message from Dineo Tsafela: "joined #David Johnson." and a note: "You have an upcoming task". The "Upcoming & Overdue" section shows a task for "Call Mr. David Johnson" scheduled for 24 Feb.

#### Slack update for lead: Emily Cater



The screenshot shows the Salesforce Lead Detail page for Ms. Emily Cater. The left sidebar includes Sales, Leads, Contacts, Accounts, Opportunities, Products, Price Books, Calendar, Analytics, Schedule Meeting for Ms. Emily with Sales, and More. The main content area displays the lead's details: Name (Ms. Emily Cater), Company (BrightFuture Academy), Title (Academic Coordinator), Website (www.brightfuture.edu), Description (Exploring CRM tools to streamline student enrollment and communication.), Lead Status (Nurturing), and Lead Owner (Dineo Tsafela). Below the lead details is a "Slack Channel" section titled "Emily Cater". It shows a message from Dineo Tsafela: "joined #Emily Cater." and a note: "You have an upcoming task". The "Upcoming & Overdue" section shows a task for "Schedule Meeting for Ms. Emily with Sales" scheduled for 27 Feb.

#### Slack update for lead: Michael Brown



The screenshot shows the Salesforce Lead Detail page for Mr. Michael Brown. The left sidebar includes Sales, Leads, Contacts, Accounts, Opportunities, Products, Price Books, Calendar, Analytics, Schedule Meeting for Mr. Brown, and More. The main content area displays the lead's details: Name (Mr. Michael Brown), Company (SolarEdge Solutions), Title (Business Development), Website (www.solaredge-solutions.com), Description (Interested in appointment scheduling and CRM integration for sales teams.), Lead Status (Nurturing), and Lead Owner (Dineo Tsafela). Below the lead details is a "Slack Channel" section titled "Michael Brown". It shows a message from Dineo Tsafela: "joined #Michael Brown." and a note: "You have an upcoming task". The "Upcoming & Overdue" section shows a task for "Schedule Meeting for Mr. Brown" scheduled for Tomorrow.

# 4. Accounts Management: Create 4 new accounts

## Creating new Account: TechNova Inc.

The screenshot shows the 'About' section of the 'New Account' form. The 'Account Name' field contains 'TechNova Inc.'. Other fields include 'Website' (www.technova.com), 'Type' (Partner), and 'Description' (Mid-sized tech company seeking CRM solutions to streamline marketing and sales pipelines.). The 'Save' button is highlighted in blue.

## NovaTech added to the CRM

The screenshot shows the account detail page for 'TechNova Inc.' under the 'Accounts' tab. The 'About' section displays the account name, website, type, and description. A 'Slack Channel' sidebar is visible on the right, titled 'Slack Channel' with the subtext 'Better collaboration with Slack'.

## Creating new Account: NovaHealth Systems.

The screenshot shows the 'About' section of the 'New Account' form. The 'Account Name' field contains 'NovaHealth Systems'. Other fields include 'Website' (www.novahealthsystems.com), 'Type' (Customer), and 'Description' (Innovative healthcare provider seeking CRM solutions to manage patient inquiries and streamline case management.). The 'Save' button is highlighted in blue.

## NovaHealth Systems added to the CRM

The screenshot shows the account detail page for 'NovaHealth Systems' under the 'Accounts' tab. The 'About' section displays the account name, website, type, and description. A 'Slack Channel' sidebar is visible on the right, titled 'Slack Channel' with the subtext 'Better collaboration with Sl...'. The bottom right corner includes the note 'Slack Channels in Salesforce are a place to collaborate and talk about your work. Anyone can'.

# 4. Accounts Management: Create 4 new accounts

## Creating new Account: BluePeak Logistics

The screenshot shows the 'New Account' creation page in Salesforce. The 'About' section contains the following fields:

- Account Name: BluePeak Logistics
- Website: www.bluepeaklogistics.com
- Type: Customer
- Description: Logistics company looking to optimize lead tracking and SLA-based task prioritization for client shipments.

At the bottom right of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The background shows a blurred view of the Salesforce navigation bar and other account records.

## BluePeak Logistics added to the CRM

The screenshot shows the account detail page for 'BluePeak Logistics'. The 'About' section displays the following information:

- Account Name: BluePeak Logistics
- Website: www.bluepeaklogistics.com
- Type: Customer
- Description: Logistics company looking to optimize lead tracking and SLA-based task prioritization for client shipments.

Below the 'About' section, there are sections for 'Upcoming & Overdue' and 'No past activity. Past meetings and tasks marked as done show up here.' On the right side, there are tabs for 'Sales', 'Service', and 'Marketing' and a 'Slack Channel' integration section.

## Creating new Account: EcoSphere Energy

The screenshot shows the 'New Account' creation page in Salesforce. The 'About' section contains the following fields:

- Account Name: EcoSphere Energy
- Website: www.ecosphereenergy.org
- Type: Customer
- Description: Renewable energy firm interested in appointment scheduling and CRM integration to manage investor relations.

At the bottom right of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The background shows a blurred view of the Salesforce navigation bar and other account records.

## EcoSphere added to the CRM

The screenshot shows the account detail page for 'EcoSphere Energy'. The 'About' section displays the following information:

- Account Name: EcoSphere Energy
- Website: www.ecosphereenergy.org
- Type: Customer
- Description: Renewable energy firm interested in appointment scheduling and CRM integration to manage investor relations.

Below the 'About' section, there are sections for 'Upcoming & Overdue' and 'No past activity. Past meetings and tasks marked as done show up here.' On the right side, there are tabs for 'Sales', 'Service', and 'Marketing' and a 'Slack Channel' integration section.

# 5. Contacts: Create 4 new contacts and link them to previous accounts

## Created contact: Glenn Sturgis

The screenshot shows the 'About' contact creation form. The 'Name' section includes 'Salutation' (Mr.), 'First Name' (Glenn), 'Last Name' (Sturgis), and 'Title' (Project Manager). The 'Account Name' field is populated with 'TechNova Inc.'. The bottom right of the form has buttons for 'Cancel', 'Save & New', and 'Save'. The background shows a list of recently updated contacts.

## Glenn Sturgis associated with TechNova Inc.

The screenshot shows the account page for 'TechNova Inc.'. In the sidebar, under 'Contacts', there is a list item for 'Glenn Sturgis' with a small profile icon. The main content area shows the account details for TechNova Inc., including its history and creation information.

## Created contact: Dina Fox

The screenshot shows the 'About' contact creation form for Dina Fox. The fields are identical to the Glenn Sturgis entry: Salutation (Mrs.), First Name (Dina), Last Name (Fox), Title (Supervisor), and Account Name (NovaHealth Systems). The bottom right has 'Cancel', 'Save & New', and 'Save' buttons.

## Dina Fox associated with NovaHealth Systems

The screenshot shows the account page for 'NovaHealth Systems'. In the sidebar, under 'Contacts', there is a list item for 'Dina Fox' with a small profile icon. The main content area shows the account details for NovaHealth Systems, including its billing information.

# 5. Contacts: Create 4 new contacts and link them to previous accounts

**Created contact: Amy Dubanowski**

The screenshot shows the 'About' contact creation dialog. The 'Name' field is highlighted in yellow. The 'Salutation' dropdown is set to 'Mrs.' and contains other options like 'Mr.', 'Miss', etc. The 'First Name' field contains 'Amy'. The 'Last Name' field contains 'Dubanowski'. The 'Account Name' dropdown is set to 'BluePeak Logistics' and contains other account names. The 'Title' field contains 'Manager'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

**Amy Dubanowski associated with BluePeak Logistics**

The screenshot shows the 'Accounts' module. The 'Accounts' tab is selected. A card for 'BluePeak Logistics' is displayed, showing its name, address fields (Billing and Shipping), and a 'History' section. The history shows it was created by Dineo Tsofela on 2026/02/22 at 16:52 and last modified by her on the same date and time. On the right sidebar, there's a 'Contacts' section listing 'Amy Dubanowski' with her title 'Manager'.

**Created contact: Mateo Fernando**

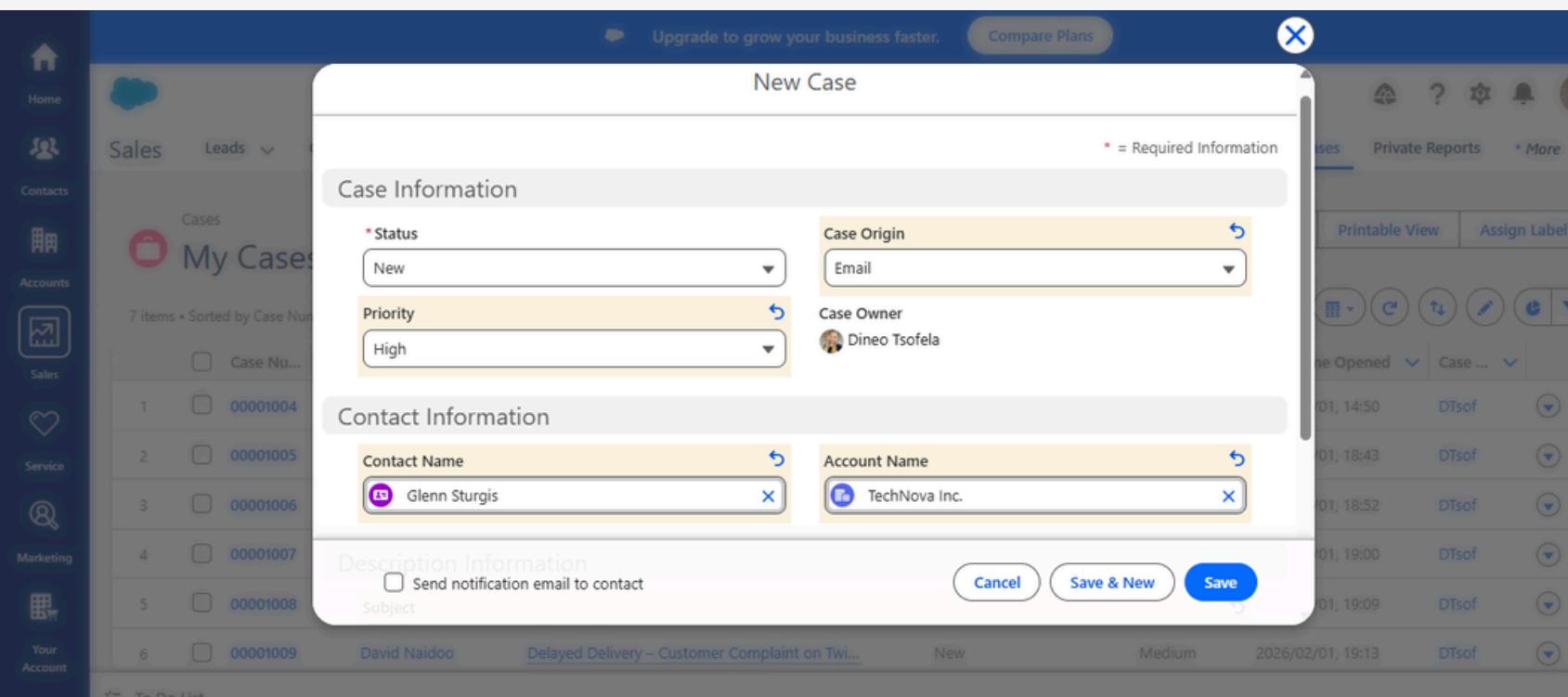
The screenshot shows the 'About' contact creation dialog. The 'Name' field is highlighted in yellow. The 'Salutation' dropdown is set to 'Mr.' and contains other options like 'Mrs.', 'Miss', etc. The 'First Name' field contains 'Mateo'. The 'Last Name' field contains 'Fernando'. The 'Account Name' dropdown is set to 'EcoSphere Energy' and contains other account names. The 'Title' field contains 'Executive Director'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

**Mateo Fernando associated with EcoSphere Energy**

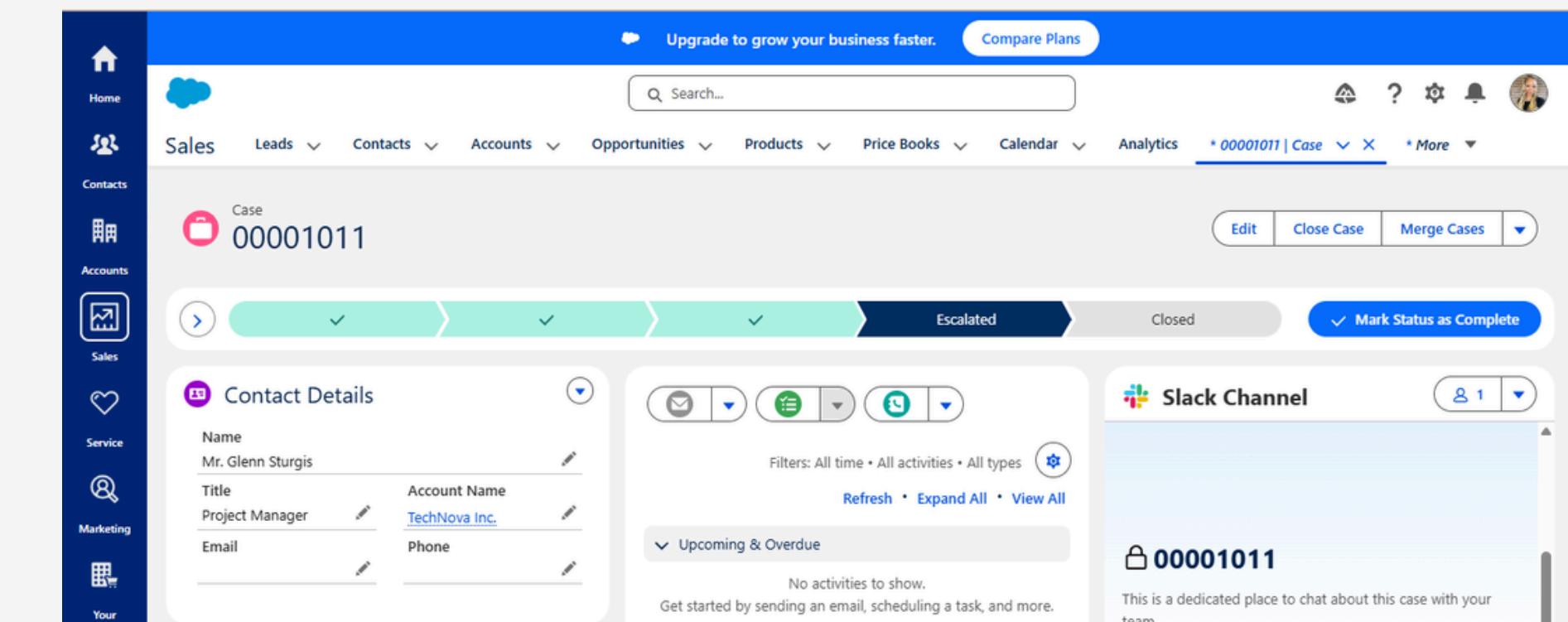
The screenshot shows the 'Accounts' module. The 'Accounts' tab is selected. A card for 'EcoSphere Energy' is displayed, showing its name and a 'History' section. The history shows it was created by Dineo Tsofela on 2026/02/22 at 16:59 and last modified by her on the same date and time. On the right sidebar, there's a 'Contacts' section listing 'Mateo Fernando' with his title 'Executive Director'.

# 6. Case Management: Create 2 customer cases

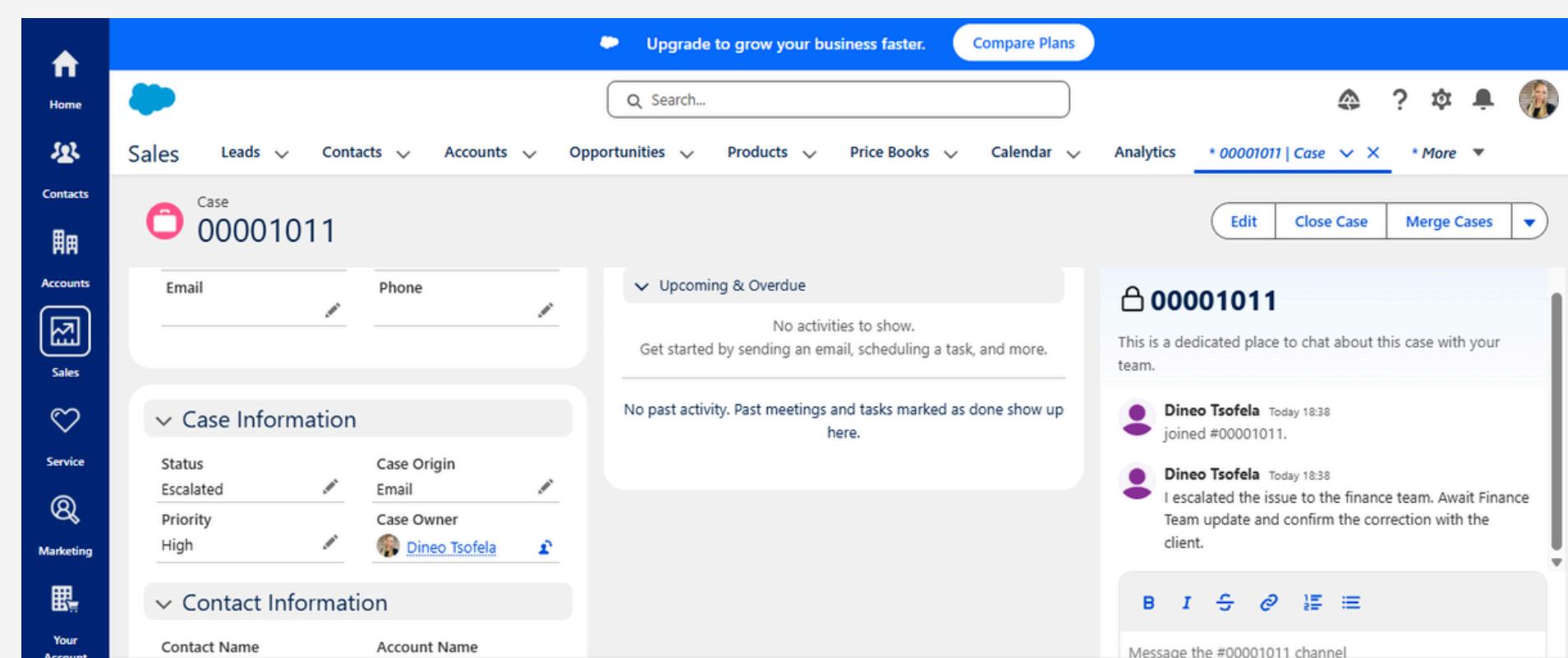
Created a new case billing issue “High Priority”



Escalated the issue to Finance team

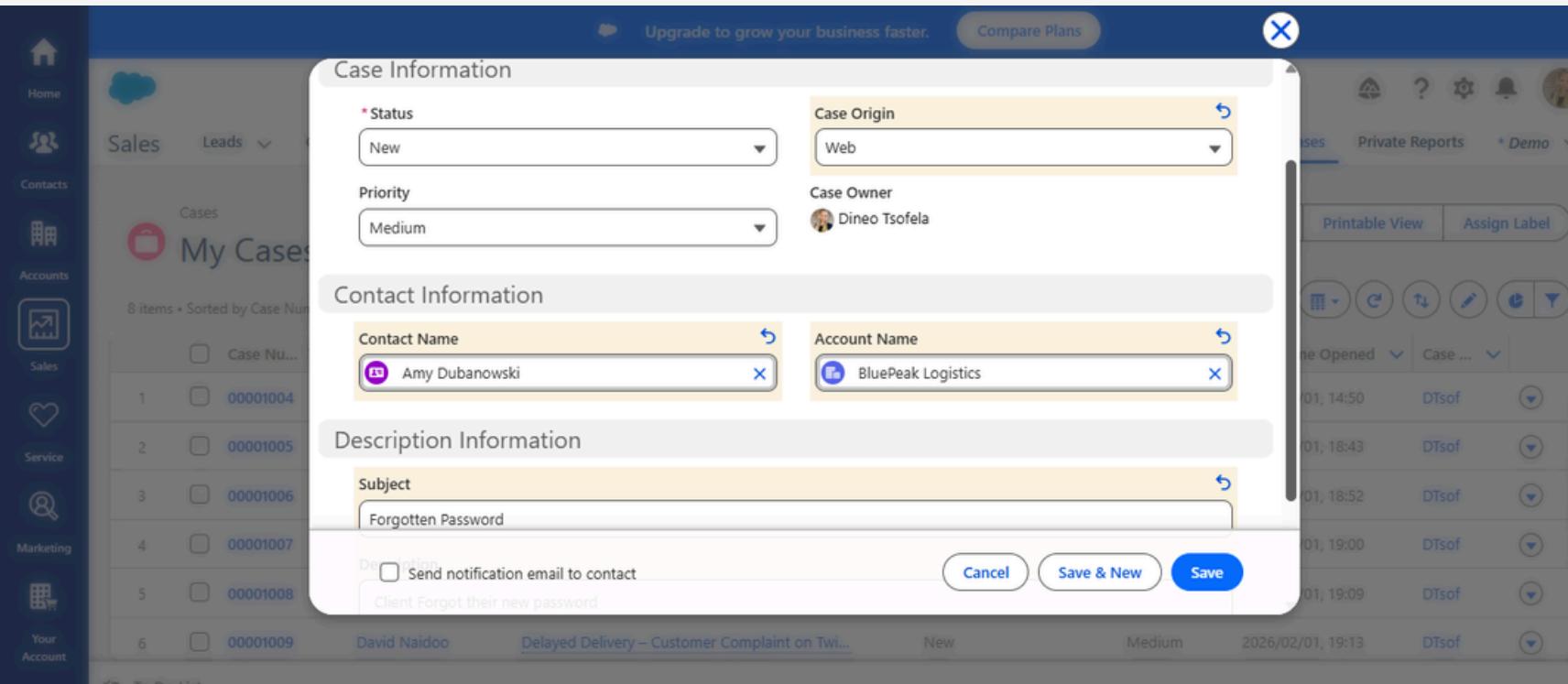


Updated Slack

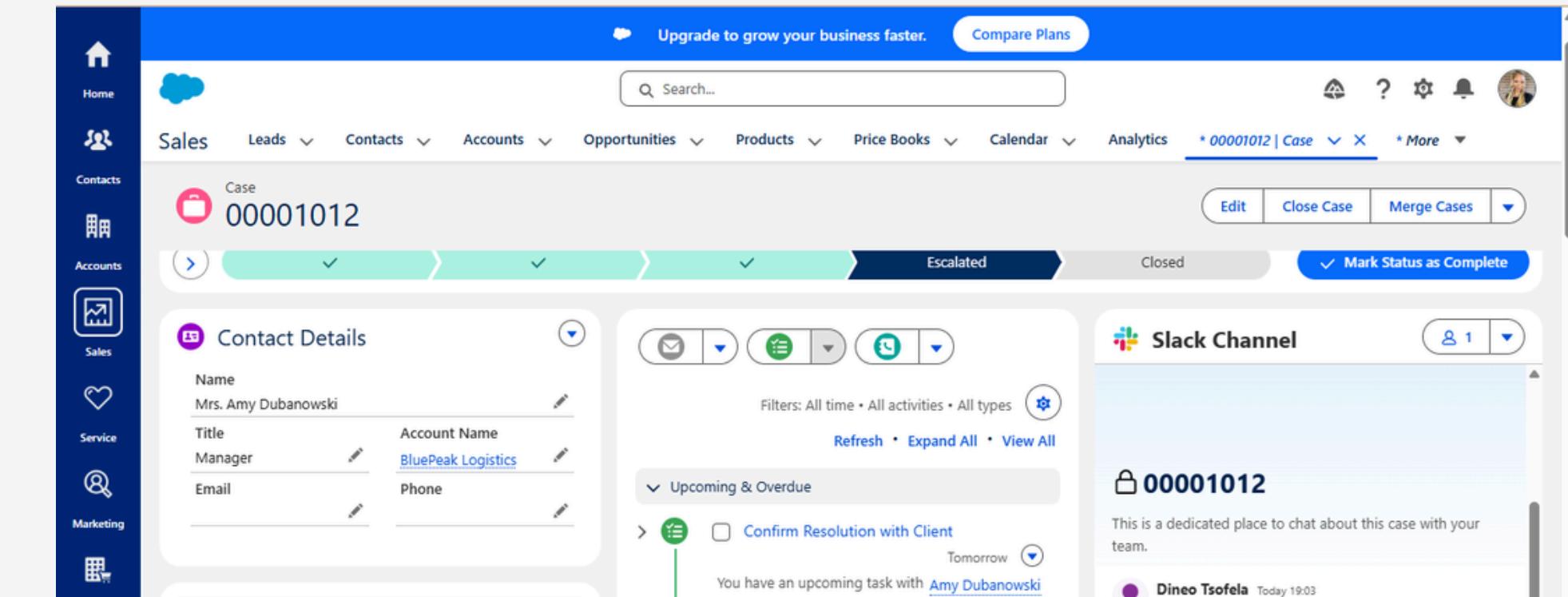


# 6. Case Management: Create 2 customer cases

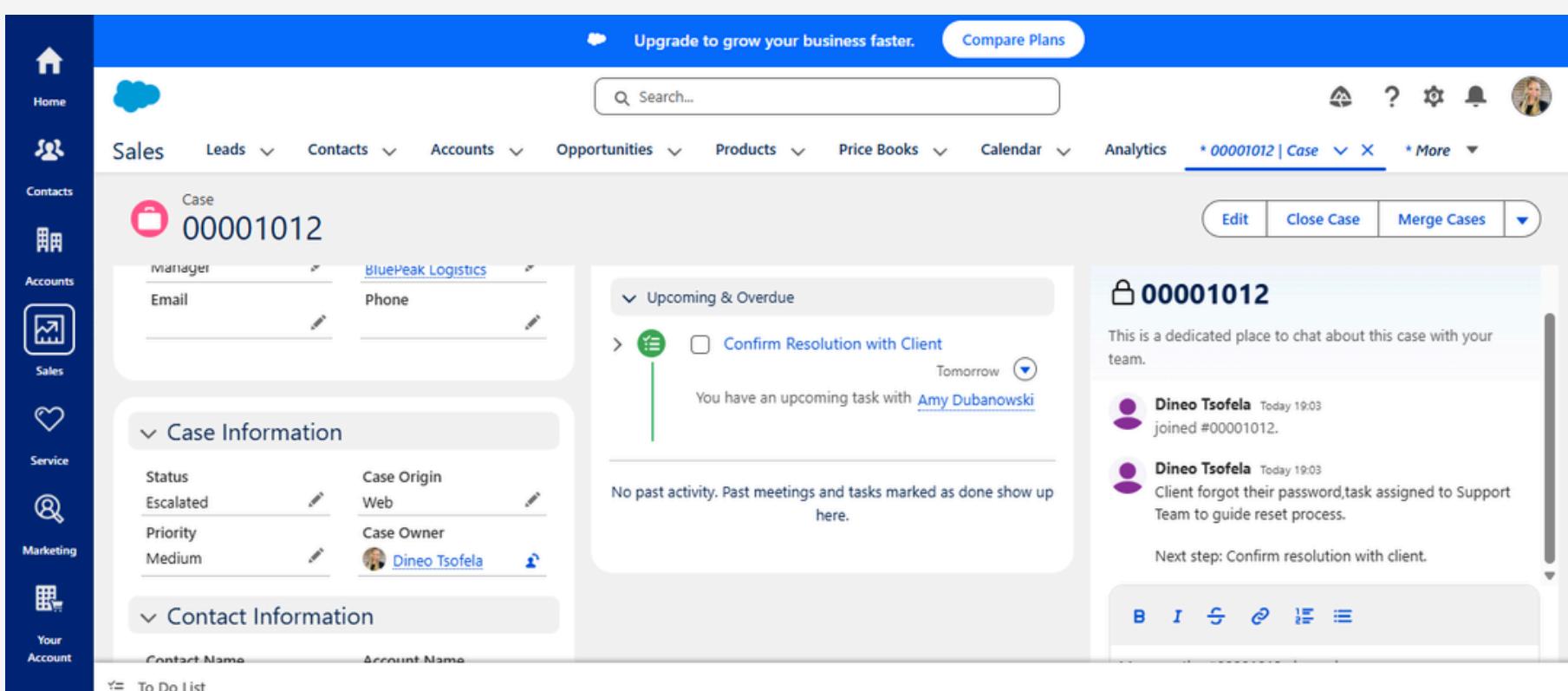
Created a new case “Password Reset”



Assigned the case to Support Team



Updated Slack



# 7. Tasks

## Tasks created while creating new leads

This screenshot shows a CRM application interface. At the top, there's a navigation bar with icons for Home, Service, Cases, Contacts, Accounts, Analytics, Knowledge, Tasks, and various filters like 'Today's Tasks', 'Unscheduled Tasks', 'Recently Viewed', and 'Demo'. Below the navigation is a search bar and a toolbar with buttons for 'Mark Complete', 'Edit Comments', 'Change Date', and 'Create Follow-Up Task'. The main content area displays a task for a lead named 'Sarah Lee' assigned to 'Dineo Tsofela'. The task details include the subject 'Demo', due date '2026/02/22', and a note indicating it's related to 'GreenWave Startups'. A sidebar on the left lists categories: Home, Service, Cases, Contacts, Accounts, Analytics, Knowledge, Tasks, and 'Your Account'.

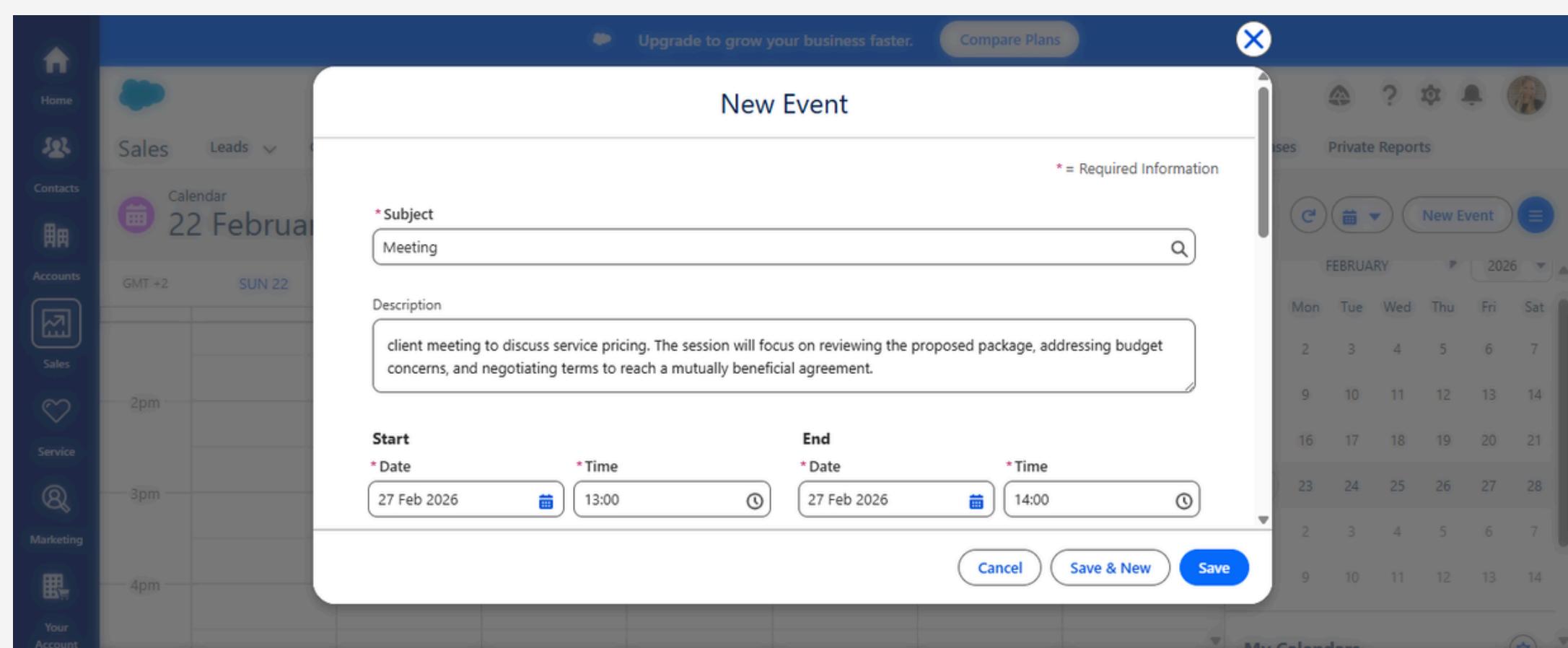
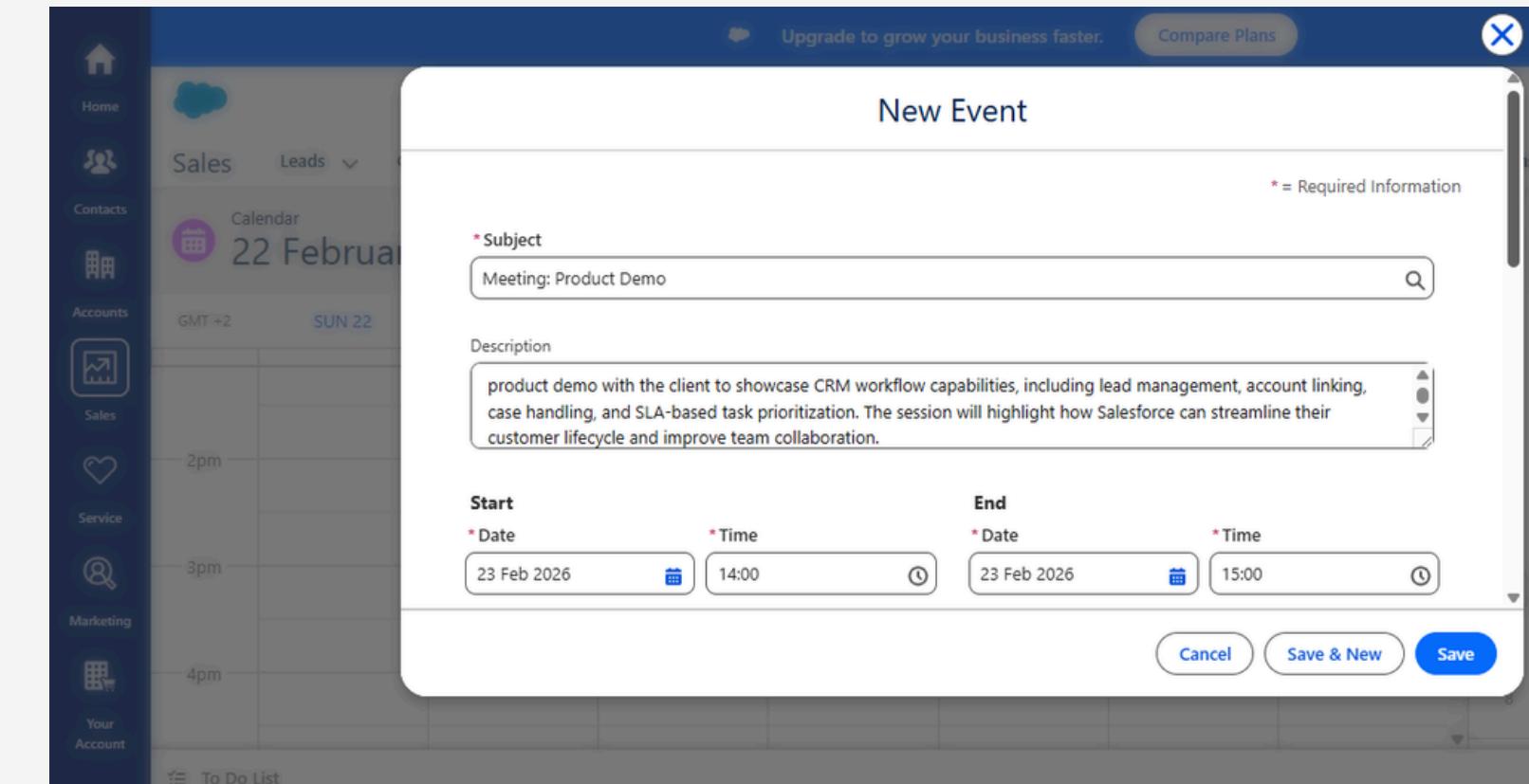
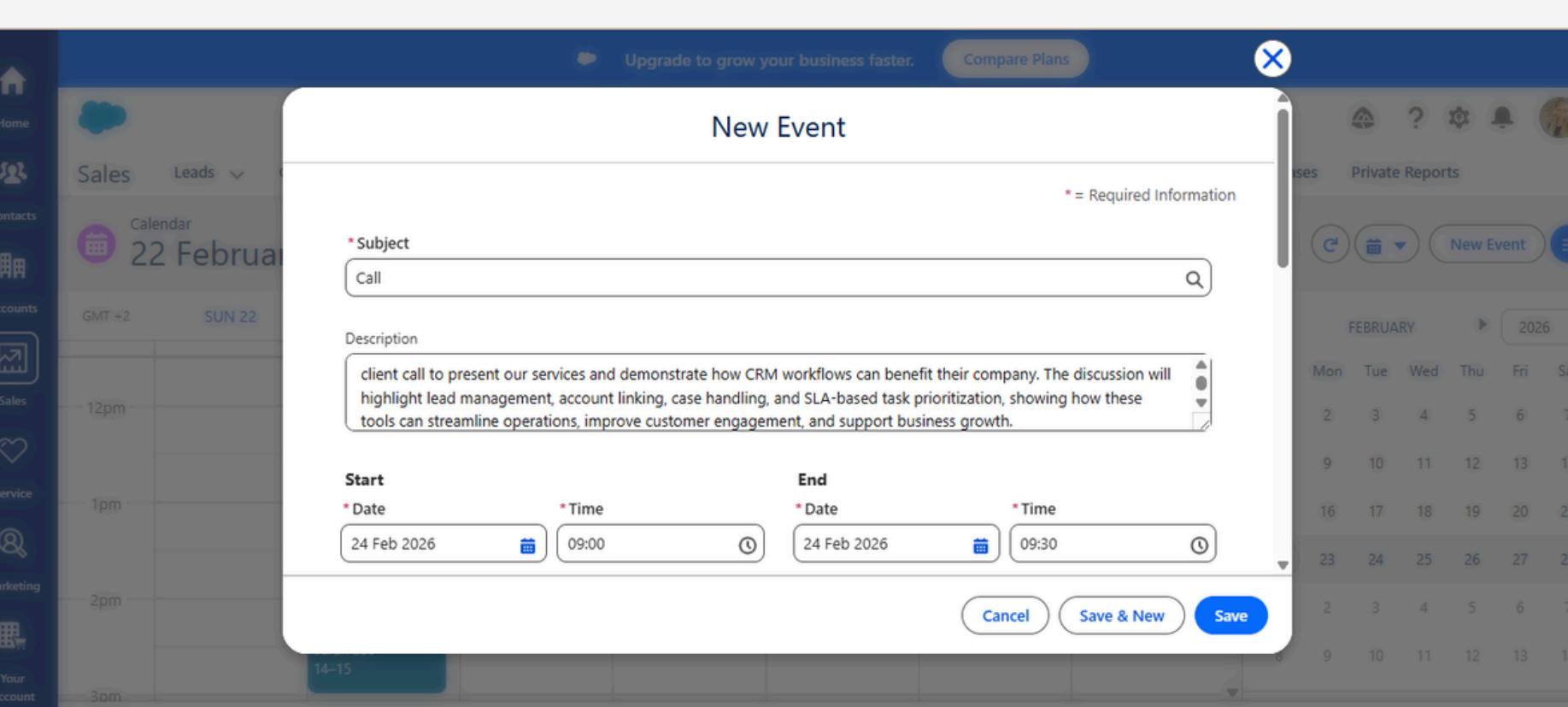
This screenshot shows a CRM application interface, similar to the one above. It displays a task for a lead named 'David Johnson' assigned to 'Dineo Tsofela'. The task details include the subject 'Call Mr. David Johnson', due date '2026/02/24', and a note indicating it's related to 'Horizon Retail Group'. The sidebar on the left is identical to the first screenshot, showing categories like Home, Service, Cases, Contacts, Accounts, Analytics, Knowledge, Tasks, and 'Your Account'.

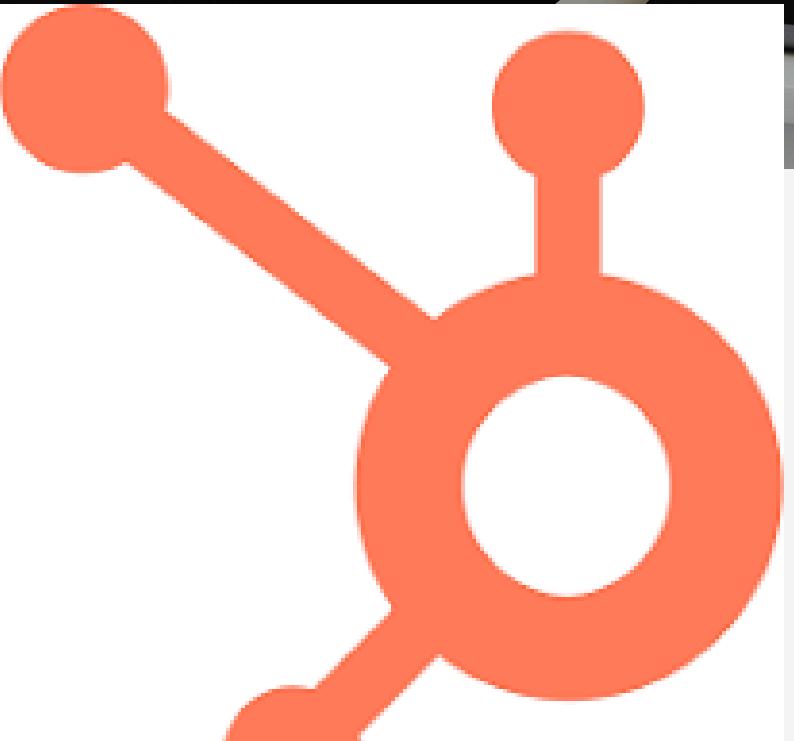
This screenshot shows a CRM application interface. It displays a task for a lead named 'Emily Cater' assigned to 'Dineo Tsofela'. The task details include the subject 'Schedule Meeting for Ms. Emily with Sales', due date '2026/02/27', and a note indicating it's related to 'BrightFuture Academy'. The sidebar on the left is identical to the first screenshot, showing categories like Home, Service, Cases, Contacts, Accounts, Analytics, Knowledge, Tasks, and 'Your Account'.

This screenshot shows a CRM application interface. It displays a task for a lead named 'Michael Brown' assigned to 'Dineo Tsofela'. The task details include the subject 'Schedule Meeting for Mr. Brown', due date '2026/02/23', and a note indicating it's related to 'Horizon Retail Group'. The sidebar on the left is identical to the first screenshot, showing categories like Home, Service, Cases, Contacts, Accounts, Analytics, Knowledge, Tasks, and 'Your Account'.

# 8. Calendar

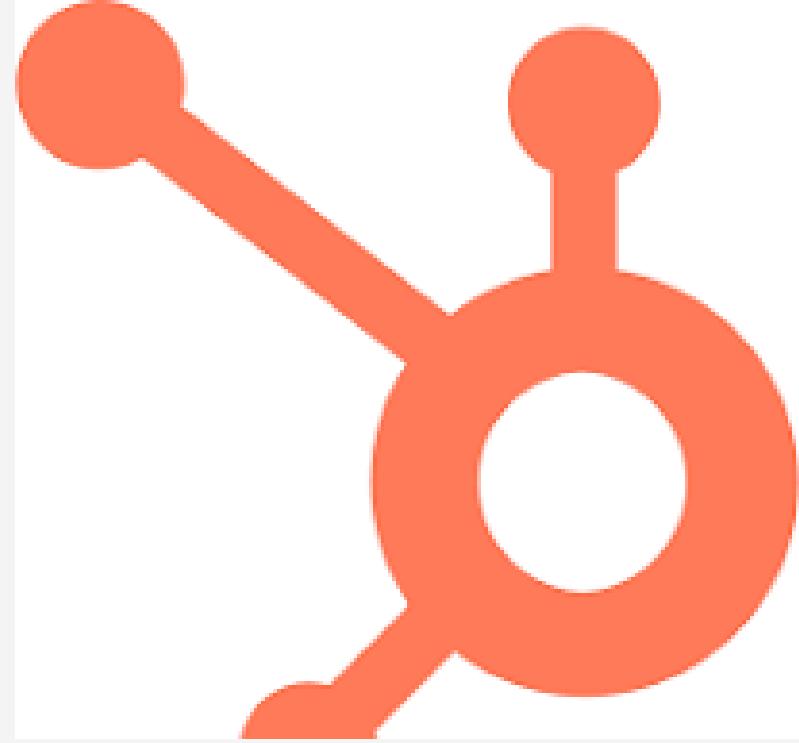
## Schedule events for client





# second project

Mock HubSpot Tasks



# 1.Companies: Add 2 new companies

## Adding Company: NovaTech

The screenshot shows the HubSpot Companies list on the left with 8 companies listed. On the right, a 'Create Company' dialog is open. The company domain name is set to 'www.novatechsolutions.co.za'. The company name is 'NovaTech Solution'. The company owner is listed as 'No owner'. The industry is 'Information Technology and Services'. At the bottom, there are 'Create', 'Create and add another', and 'Cancel' buttons.

## Company added to CRM

The screenshot shows the 'NovaTech Solution' company detail page. It includes sections for 'About', 'Activities', 'Revenue', and 'Intelligence'. The 'About' section displays a 'Breeze record summary' which states 'Generated Feb 23, 2026' and 'There are no associated activities and further details are needed to provide a comprehensive summary'. The 'Key information' section lists the company owner as 'No owner', lead status as 'New', type as 'Vendor', and lifecycle stage as 'Lead'. The 'Company profile' section shows the city as 'Johannesburg', street address as '56 Joe Slovo Road', and postal code as '5001'. A sidebar on the right shows 'Contacts (0)', 'Deals (0)', and 'Tickets (0)'.

## Adding Company: Horizon Logistics

The screenshot shows the HubSpot Companies list on the left with 9 companies listed. On the right, a 'Create Company' dialog is open. The company domain name is set to 'www.horizonlogistics.co.za'. The company name is 'Horizon Logistics'. The company owner is listed as 'Sabali \_Dineo'. The industry is 'Transportation/Trucking/Railroad'. At the bottom, there are 'Create', 'Create and add another', and 'Cancel' buttons.

## Company added to CRM

The screenshot shows the 'Horizon Logistics' company detail page. It includes sections for 'About', 'Activities', 'Revenue', and 'Intelligence'. The 'About' section displays a 'Breeze record summary' which states 'There are no associated activities and further details are needed to provide a comprehensive summary'. The 'Key information' section lists the company owner as 'Sabali \_Dineo', lead status as 'New', type as 'Other', and lifecycle stage as 'Lead'. The 'Company profile' section shows the city as 'Durban', street address as 'Umbilo Road', and postal code as '4008'. The state/region is 'KwaZulu Natal' and the country/region is 'South Africa'. The industry is 'Transportation/T...'. A sidebar on the right shows 'Contacts (0)', 'Deals (0)', 'Tickets (0)', 'Companies (0)', 'Attachments', and 'Signals'.

## 2. Companies: Update company record with latest engagement notes and tasks

### Created Notes: NovaTech Solutions

The screenshot shows the NovaTech Solutions company record in HubSpot. The main panel displays a note from Sabali Dineo dated Feb 23, 2026, at 8:30 PM GMT+2. The note content is: "NovaTech Solutions is currently exploring CRM platforms to improve client onboarding and streamline support workflows. They are particularly interested in Salesforce and HubSpot integrations to unify lead management, case tracking, and appointment scheduling. The Operations Manager (Thabo Mokoena) has requested a demo to understand how CRM workflows can reduce manual data entry and improve SLA compliance." Below the note, there's an "Add comment" button and a "Record Enriched" section indicating one property was updated.

### Created Task: NovaTech Solutions

The screenshot shows the NovaTech Solutions company record in HubSpot. The main panel displays a task assigned to Sabali Dineo with the due date set for Feb 25, 2026, at 9:00 AM GMT+2. The task description is: "Schedule demo to showcase Salesforce and HubSpot workflows." The task is categorized as a "To-do" with medium priority and assigned to Sabali Dineo. A reminder note says: "-Prepare notes before demo".

### Created Notes: Horizon Logistics

The screenshot shows the Horizon Logistics company record in HubSpot. The main panel displays a note from Sabali Dineo dated Feb 23, 2026, at 9:02 PM GMT+2. The note content is: "They are exploring CRM platforms like HubSpot to centralize client records, track interactions, and improve case management. The Client Relations Specialist (Priya Naidoo) has expressed interest in automating scheduling through tools like Calendly, integrated with HubSpot, to reduce missed appointments and improve efficiency." Below the note, there's an "Add comment" button and a "Record Enriched" section indicating one property was updated.

### Created Task: Horizon Logistics

The screenshot shows the Horizon Logistics company record in HubSpot. The main panel displays a task assigned to Sabali Dineo with the due date set for Mar 2, 2026, at 8:00 AM GMT+2. The task description is: "Schedule negotiation meeting with Priya Naidoo – Monday at 10:00 AM." The task is categorized as a "To-do" with medium priority and assigned to Sabali Dineo. A reminder note says: "Set to repeat".

### 3. Contacts: Create 2 new contacts

#### Created new contact

No Contacts match the current filters.  
Expecting to see new Contacts? Try again in a few seconds as the system catches up.

#### Contact created: Linked to NovaTech Solution

Thabo Mokoena  
Operations Manager at NovaTech Solution  
thabo.mokoena@novatechsolutions.co.za

Email: thabo.mokoena@novatechsolutions.co.za  
Phone Number: +27 82 456 7890  
Job Title: Operations Manager  
Contact owner: Sabali \_Dineo

#### Created New Contact

New customers (8) : X Happy customers

NAME	EMAIL	PHONE NUMBER
Thabo Mokoena	thabo.mokoena@novatech...	+27 82 456 7890
Sarah Parker	sarajessicaparker@yahoo....	0837870788
Michael Scott	michaelscott@brightwave....	+27-67-543-2
Rosalind Matthews	advancedtech@yahoo.com...	+27-87-612-3
Simon Said	simonsaid@business.com	+27-56-782-3
Nick Boardman	nick@crmcrew.co.uk	+1 (49) 425-6

#### Contact created: Linked to Horizon Logistics

Priya Naidoo  
Client Relations Specialist at Horizon Logistics  
priya.naidoo@horizonlogistics.co.za

Email: priya.naidoo@horizonlogistics.co.za  
Phone Number: +27 83 234 5678  
Job Title: Client Relations Specialist  
Contact owner: Sabali \_Dineo

# 4. Contacts: Schedule Demo and meeting for contact

## Scheduling a Demo for Contact

The screenshot shows the 'Schedule' interface for a demo. The host is set to 'User' (Sabali \_Dineo). The title is 'Demo to showcase Salesforce and HubSpot workflow'. The start date is 02/25/2026, at 9:00 AM, and the end time is 10:00 AM. The calendar view shows a slot from 9:00 AM to 10:00 AM on Tuesday, 25th, which is highlighted in blue and labeled 'Demo to show... 9:00 AM - 10:00 AM'. The attendees section shows '2 attendees'. At the bottom, there are 'Schedule meeting' and 'Cancel' buttons.

## Demo scheduled for contact

The screenshot shows the contact profile for Thabo Mokoena. The 'Activities' tab is selected. An upcoming meeting is listed: 'Meeting - Demo to showcase S...' on Feb 25, 2026, at 9:00 AM GMT+2, organized by Sabali \_Dineo. The contact information includes: Name (Thabo Mokoena), Title (Operations Manager), Email (thabo.mokoena@novatechsolutions.co.za), Phone Number (+27 82 456 7890), and Job Title (Operations Manager). The contact is associated with 'Companies (1)' and 'Deals (0)'. A note states: 'Product expert and NovaTech Solutions Operations Manager'.

## Scheduling meeting for contact

The screenshot shows the 'Schedule' interface for a meeting with Priya Naidoo. The host is set to 'User' (Sabali \_Dineo). The title is 'meeting with Priya Naidoo'. The start date is 03/09/2026, at 10:00 AM, and the end time is 11:00 AM. The calendar view shows a slot from 10:00 AM to 11:00 AM on Monday, 9th, which is highlighted in blue and labeled 'meeting with ... 10:00 AM - 11:00 AM'. The attendees section shows '2 attendees'. At the bottom, there are 'Schedule meeting' and 'Cancel' buttons.

## Meeting scheduled for contact

The screenshot shows the contact profile for Priya Naidoo. The 'Activities' tab is selected. An upcoming meeting is listed: 'Meeting - meeting with Priya ...' on Mar 9, 2026, at 10:00 AM GMT+2, organized by Sabali \_Dineo. The contact information includes: Name (Priya Naidoo), Title (Client Relations Specialist), Email (priya.naidoo@horizonlogistics.co.za), Phone Number (+27 83 234 5678), and Job Title (Client Relations Specialist). The contact is associated with 'Companies (1)' and 'Deals (0)'. A note states: 'The Client Relations Specialist (Priya Naidoo) has expressed interest in automating scheduling through tools like Calendly, integrated with HubSpot, to reduce missed appointments and improve efficiency.'

# 5. Create 2 new tickets

## Creating ticket for a client

Create Ticket

Ticket name \*

Password Reset - NovaTech Solutions

Pipeline \*

Ticket pipeline

Ticket status \*

New

Ticket description

Thabo reported that he is unable to access his client dashboard due to a forgotten password. He requires assistance resetting his login credentials to continue onboarding new clients.

Create Create and add another Cancel

## ticket in the CRM

Tickets Actions

**Password Reset - NovaTech Solutions**

Create date: Feb 24, 2026 4:05 PM GMT+2  
Pipeline: Ticket pipeline  
Ticket status: New

Note Email Call Task Meeti... More

About this ticket Actions

Ticket description  
Thabo reported that he is unable to access his client dashboard due to a forgotten password. He requires assistance resetting his login credentials to continue onboarding new clients.

Ticket owner  
Sabali \_Dineo

## Creating ticket for a client

Create Ticket

Ticket name \*

Missed Demo Appointment - Horizon Logistics

Pipeline \*

Ticket pipeline

Ticket status \*

New

Ticket description

Priya missed her scheduled demo meeting due to a scheduling conflict. She requested a reschedule to review CRM appointment booking features.

Create Create and add another Cancel

## ticket in the CRM

Tickets Actions

**Missed Demo Appointment - Horizon Logistics**

Create date: Feb 24, 2026 4:22 PM GMT+2  
Pipeline: Ticket pipeline  
Ticket status: New

Note Email Call Task Meeti... More

About this ticket Actions

Ticket description  
Priya missed her scheduled demo meeting due to a scheduling conflict. She requested a reschedule to review CRM appointment booking features.

Ticket owner  
Sabali \_Dineo



# Third project

Mock Calendly Tasks



# 1. Scheduling a demo for a client on Calendly

## Scheduling the appointment

## Appointment scheduled into the system

This is a preview. To book an event, share the link with your invitees.

Sabali\_Dineo  
**CRM Demo – NovaTech Solutions**

30 min Add a location for it to show here

Demonstrate HubSpot CRM features for client onboarding and workflow automation.

Select a Date & Time

February 2026 Friday, February 27

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

09:00  
09:30  
10:00  
10:30

Limits and buffers

Preview Back Save changes

Calendly

+ Create

Scheduling

Event types Single-use links Meeting polls

Meetings Availability Contacts Workflows Integrations & apps Routing

Search event types

S Sabali\_Dineo

CRM Demo – NovaTech Solutions 30 min • Google Meet • One-on-One Weekdays, 09:00 - 16:00

30 Minute Demo Call 30 min • Google Meet • One-on-One Weekdays, 09:00 - 16:00

View landing page Copy link Turn On Get started

How it looks on the client's end to pick their available time and time

Sabali\_Dineo  
**CRM Demo – NovaTech Solutions**

30 min

Web conferencing details provided upon confirmation.

Demonstrate HubSpot CRM features for client onboarding and workflow automation.

Select a Date & Time

February 2026

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

Sabali\_Dineo  
**CRM Demo – NovaTech Solutions**

30 min

Web conferencing details provided upon confirmation.

Demonstrate HubSpot CRM features for client onboarding and workflow automation.

Select a Date & Time

February 2026 Friday, February 27

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

Time zone Central (UTC-05:00)

09:00  
09:30  
10:00  
10:30  
11:00  
11:30

A photograph of a person from the waist down, sitting cross-legged on a dark surface. They are wearing light-colored corduroy pants and white sneakers with brown accents. Their hands are resting on a silver tablet device, which has a white stylus pen resting on its screen. The background is dark and out of focus.

# THANK YOU!

Neo Tsofela

dineotsofela@gmail.com

+27678455149