

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

Submitted by

S.SHINY(20321TR029)

S.SARANYA(20321TR027)

A.SATHIYAVANI MUTHU(20321TR028)

S.SOWMIYA(20321TR030)

Team ID: NM2023TMID19491

Under the guidance of

Mrs .T.ESWARI.M.Sc.,B.Ed.,M.Phil

Guest Lecturer



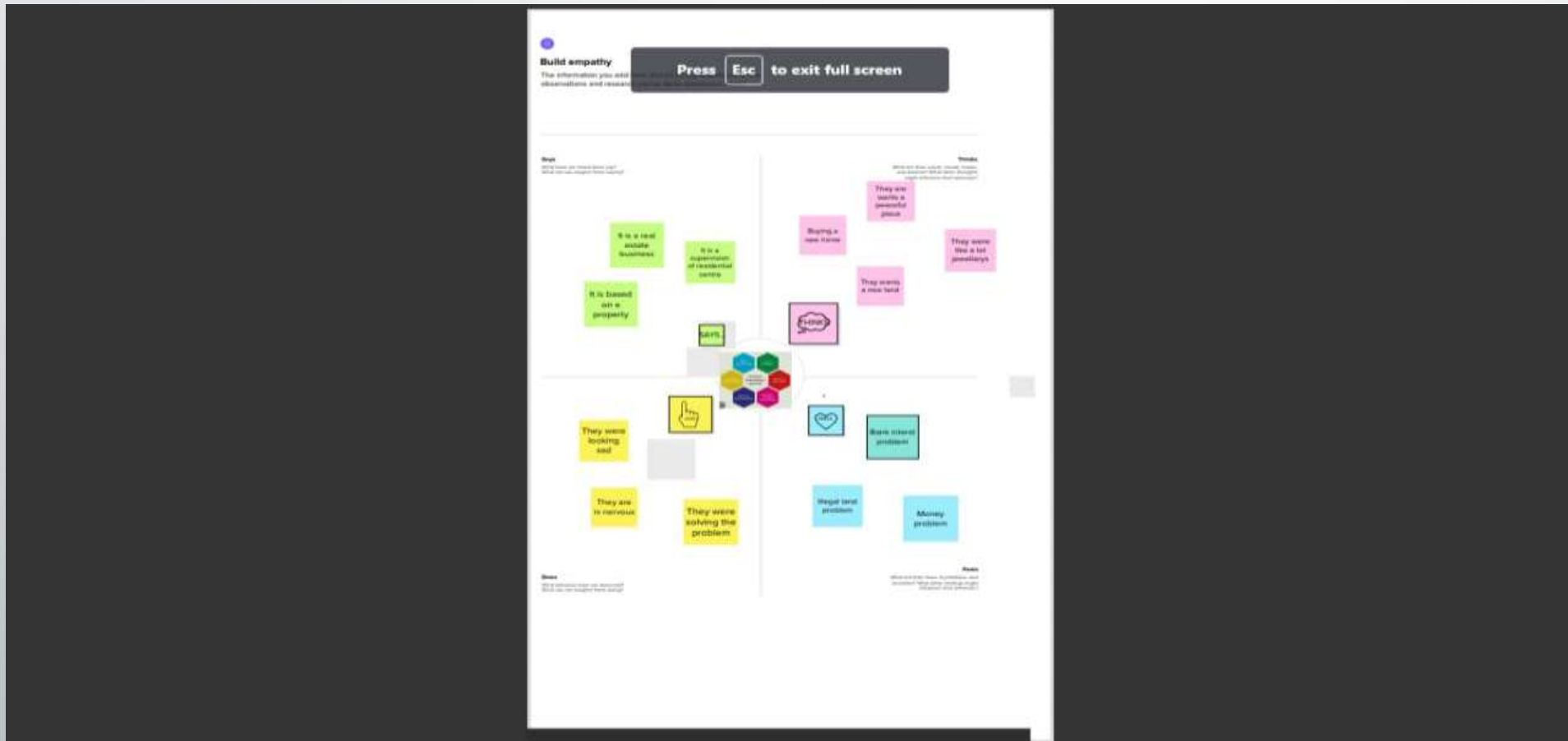
M.V.MUTHIAH GOVT ARTS COLLEGE FOR WOMEN

INTRODUCTION

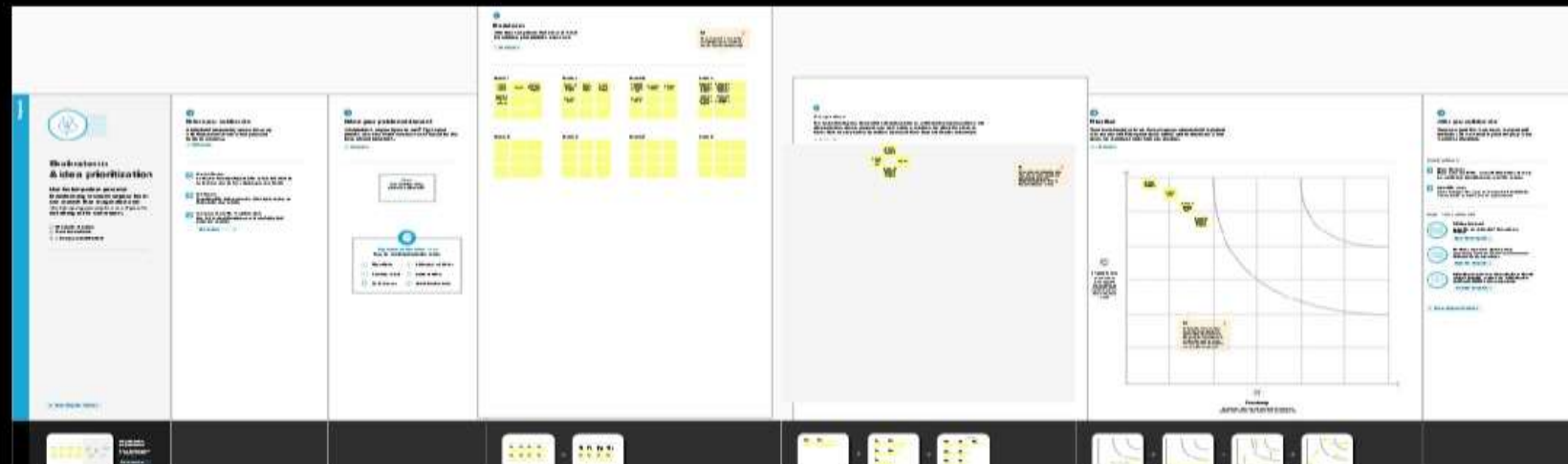
Property management is the daily oversight of residential, commercial, or industrial real estate by a third-party contractor. Generally, [property managers](#) take responsibility for day-to-day repairs and ongoing maintenance, security, and upkeep of properties. They usually work for the owners of investment properties such as apartment and condominium complexes, private home communities, shopping centers, and industrial parks.

Their main roles are to manage routine tasks delegated to them by the owners and to preserve the value of the properties that they manage while generating [income](#).

EMPATHY MAP



IDEATION AND BRAINSTORMING MAP



SALESFORCE

Creating Developer Account Creating a developer org in salesforce.

1. Go to developers.salesforce.com/

2. Click on sign up.

3. On the sign up form, enter the following details :

a. First name & Last name

b. Email

c. Role : Developer

d. Company : College Name

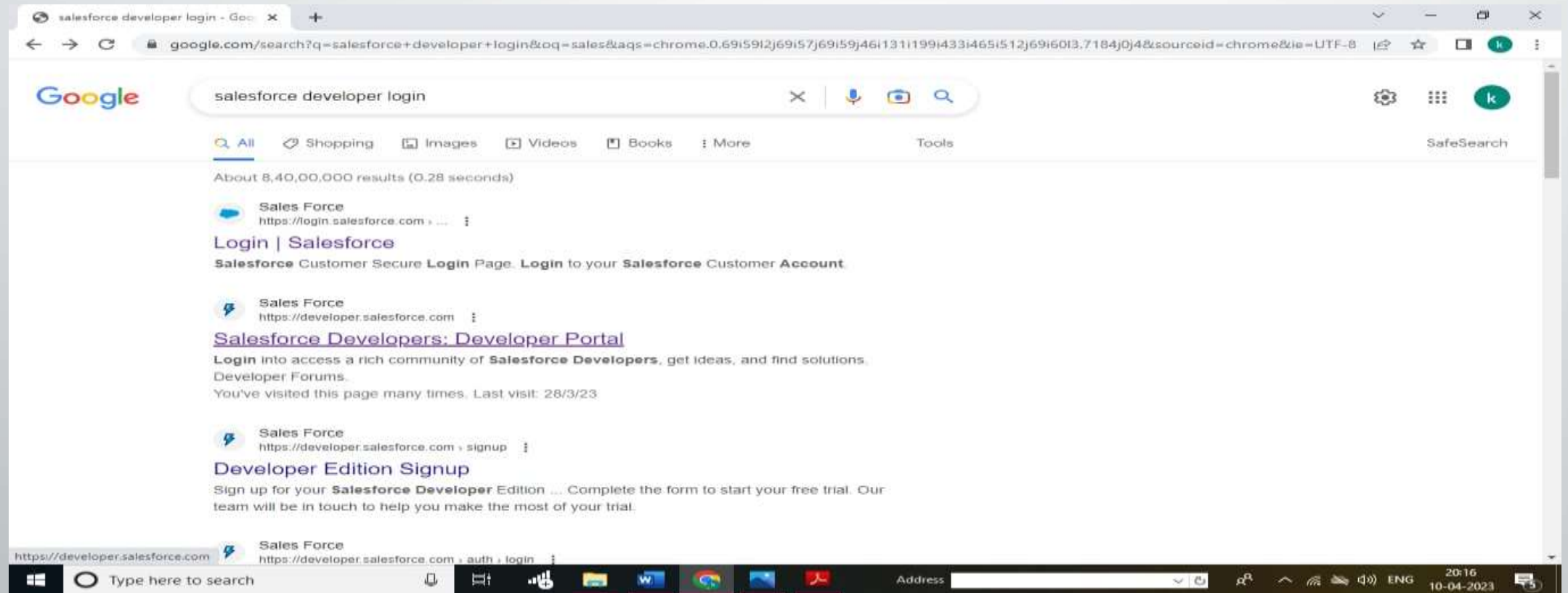
e. County : India

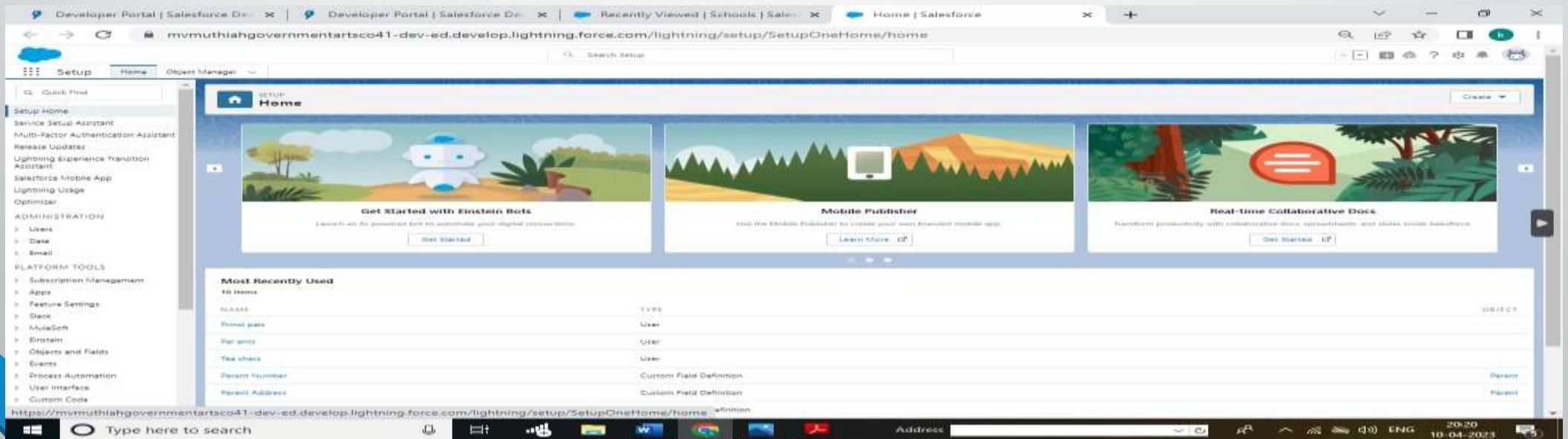
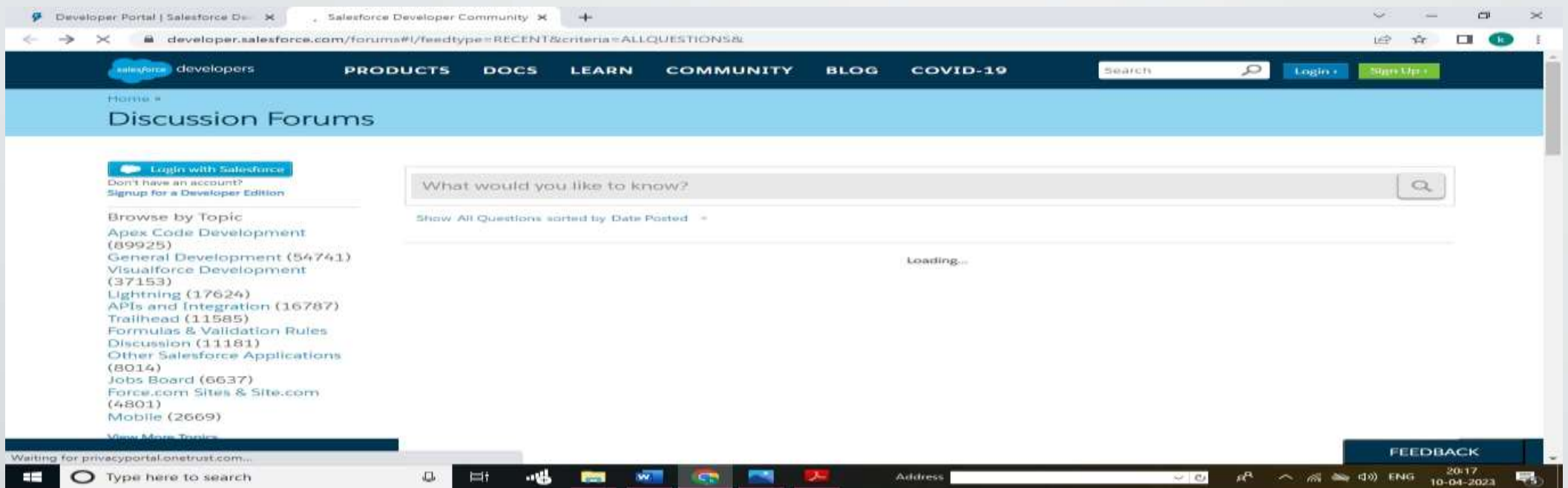
f. Postal Code : pin code

g. Username :

should be a combination of your name and company This need not be an actual email id, you can give anything in the format : `username@organization.com` Click on sign up after filling these

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as
2. Login To Your Salesforce Account





OBJECTS AND TAB

Objects

To Navigate to Setup page:

1. Click on gear icon → click setup

To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search → Save

Create Object Buy

1. To create an object
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name→Buy
4. plural label name→ Buyers
5. click on Allow reports
- , 6. Allow search →Save

Create Object Rent

1. To create an object:
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name→Rent
4. plural label name→ Rents
5. click on Allow reports,
6. Allow search →Save

Create Object Loan

7. To create an object:
8. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object
- . 9. Enter the label name→Loan
- 10.plural label name→ Loans
11. click on Allow reports,
- 12.Allow search →Save

(1) WhatsApp

Rent | Salesforce

Edit Custom Object: Rent - Sale

← → ↺

mvmuthaiahgovtartscollegefo-dev-ed.develop.my.salesforce.com/01I2w000003bJb8/e?appLayout=setup&noS1Redirect=true

🔖 ☆ 🗖 ⚙

salesforce

'23

Search...

Search

⚡ Switch to Lightning Experience

Saranya S ▾

Setup

Help

Content ▾

Home

Chatter

Libraries

Content

Subscriptions

Buyers

Rents

Loans

Students

Marketins

Sales

Dashboards

Lead with loan amounts

+

Quick Find / Search... 🔍

Expand All | Collapse All

🌸 → ⚡

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Manage Apps

Manage Territories

Company Profile

Data Classification

Privacy Center

Security Controls

Domain Management

Communication Templates

Edit Custom Object

Rent

Help for this Page 🗉

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

Required Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label

Rent

Example: Account

Plural Label

Rents

Example: Accounts

Starts with vowel sound

☐

The Object Name is used when referencing the object via the API.

Object Name

Rent

Example: Account

Description

Money

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

None ▾

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

TAB

Create the Lightning Tab

To create a Tab:(Lead)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(Lead) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.

To create a Tab:(Buy)

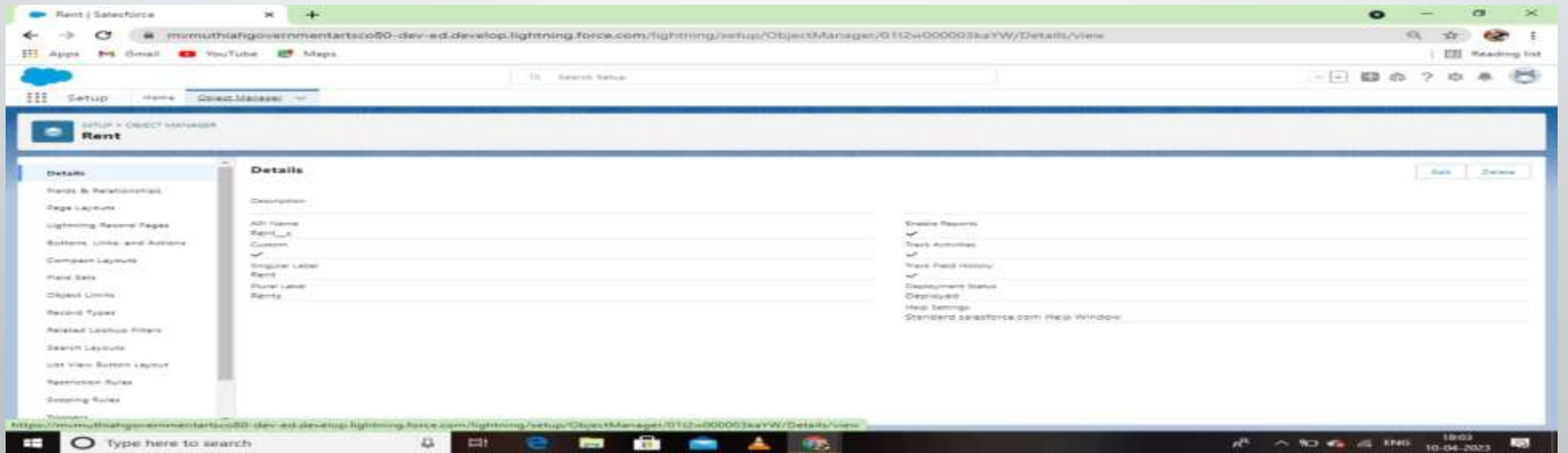
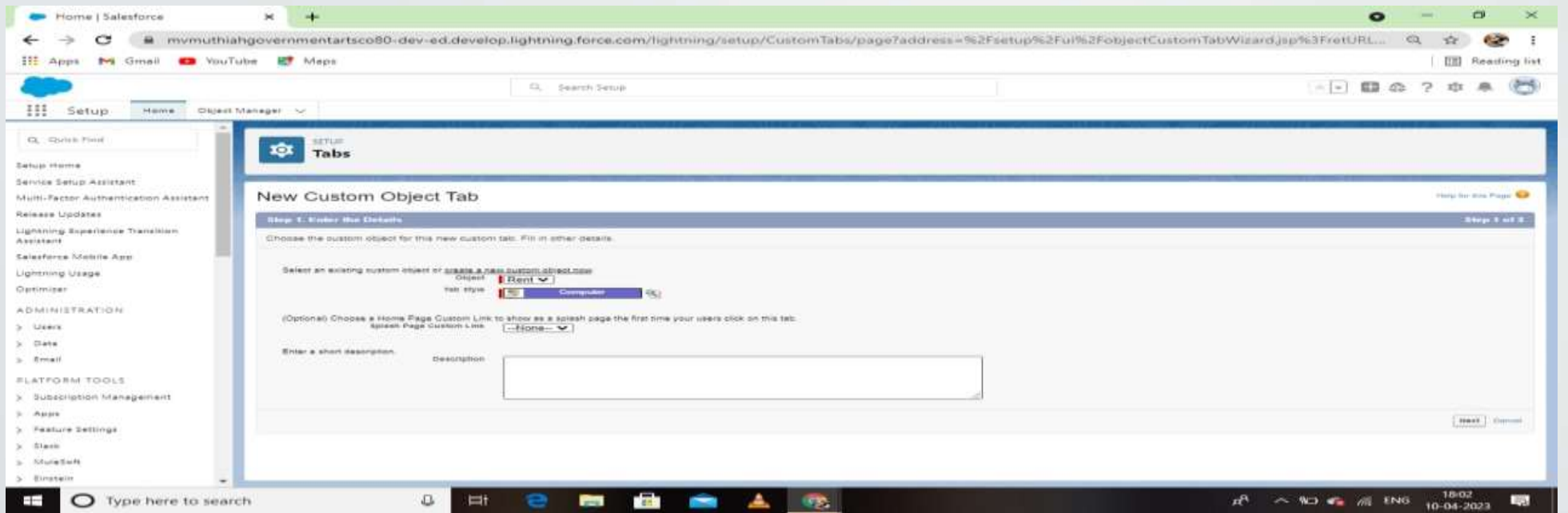
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save

To create a Tab:(Rent)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(Rent) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save

To create a Tab:(Loan)

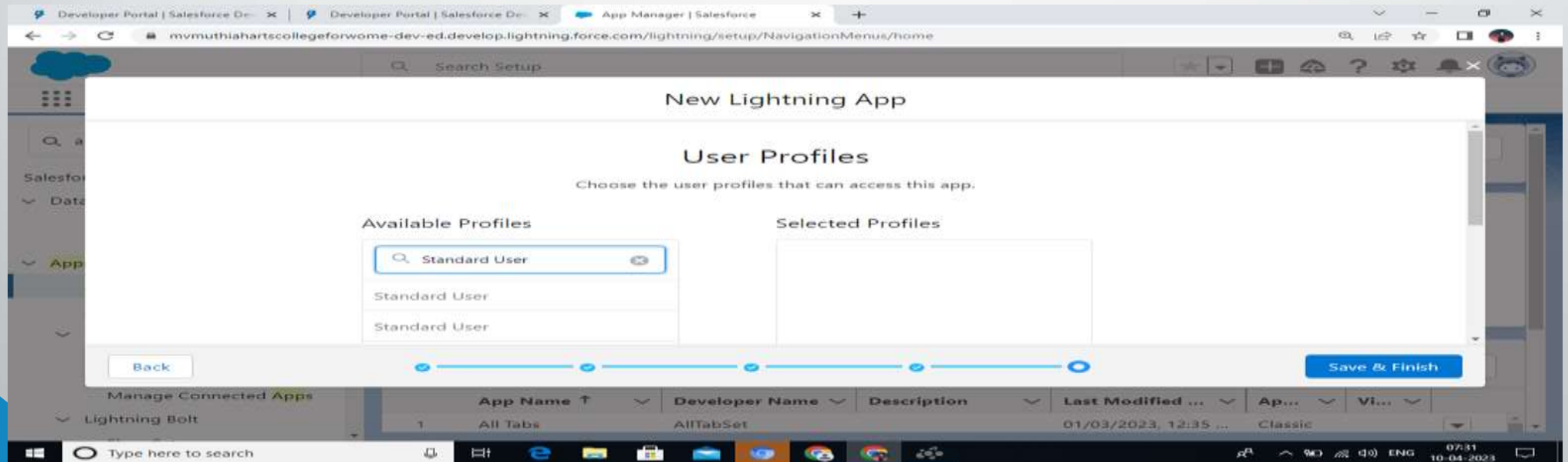
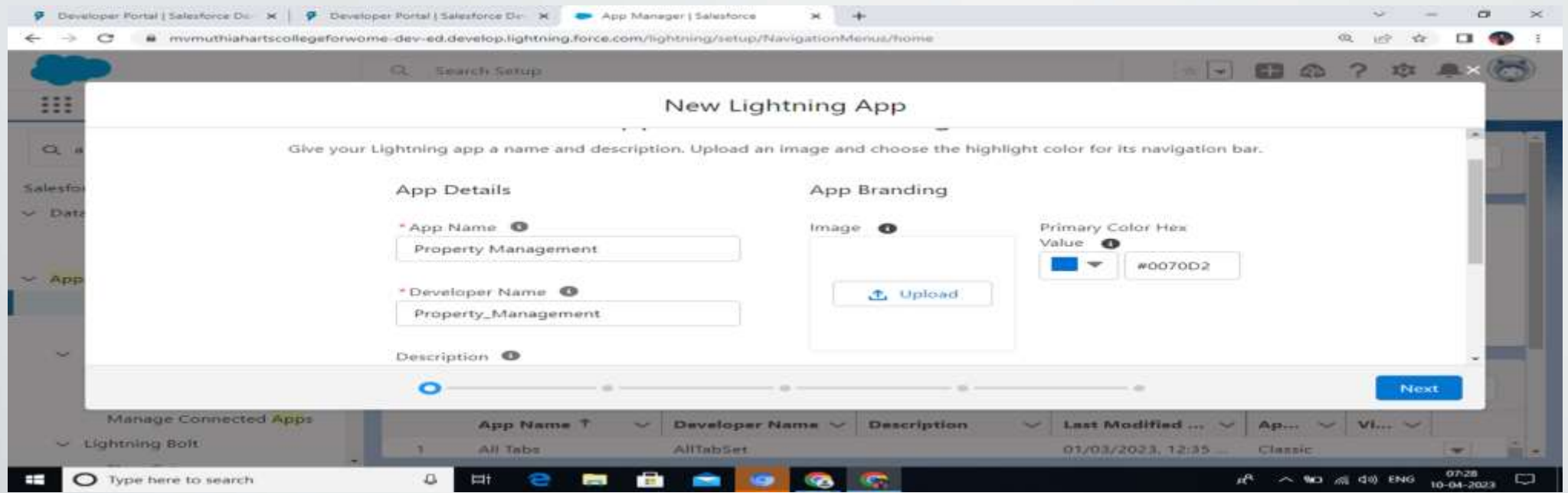
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save



THE LIGHTNING APP

Create the Lightning App

1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning
2. Fill the app name as an Property Management in app details and branding → Next → (App option page) keep it as default → Next
3. (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Lead, Buy, Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce platform user, Standard User → Next
4. To Add Navigation Items: Select the items from the search bar and move it using the arrow button → Next
5. To Add User Profiles: Search profiles in search bar → click on the arrow button → save & finish



FIELDS

Create the Lead Field

1. Go to setup → click on Object Manager → type object name in search bar → click on the object
2. Now click on “Fields & Relationships ” → New
3. Fill the field label name Lead → Next → Next → Save

Create the remaining Fields:

Follow the Above Steps to create the Field just change the Labels for Below Fields

Lead:(AutoNumber Created Field while creating Object)→L-{0000}

State: Create the Picklist Field (Maharashtra, Gujarat,Rajasthan)(Field Dependency)

City: Create the Picklist(Mumbai, Pune, Nashik)(FieldDependency)

Email: Create the Email Select the Data Type As Email (Email)

Phone: Select the Field Data type as (Phone)

In the Fields and Relationship go to the Field Dependencies

For Object Buy

1. Create Field for Buy
2. **Create Property Type:** (Picklist) (Residential, Commercial, Industrial)
3. **Discount:**(Percentage As the Field Data Type)
4. **State:** Create the Picklist Field (Maharashtra, Gujarat,Rajasthan)(Field Dependency)
6. **Annual Amount To Be Paid**
5. **City:**(Take Any City for Field Dependency)

Create Field for Rent

1. **Rent:**(Auto Number while Creating the object)→ R-{0000}
2. **Rental City:** Select the Text as the Field Data Name(Any City)
3. **BHK type:**(Picklist)(1BHK, 2BHK,3BHK)

Create Field for Loan

1. **Loan Id:** Auto generated Field Take it as Auto number LN-{0000}
2. **Interest Rate:** (Select the Field Data Type As Currency)
3. **Term:**(Select the Field Data type as Number)
4. **Annual Loan :**Field create the Number as the field datatype
5. **Total Loan Instalments:**(Field create the Number as the field data type)
6. **Loan Repayment**(Field create the Number as the field data type)
7. **Loan Amount:**(Select the Field data type as Formula)
8. For the Loan Object→Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following formula

$$(\text{Loan_Repayment_c} * (((1 + (\text{Interest_rate_c} / 52))^{\text{Term_c}}) - 1)) / ((\text{Interest_rate_c} / 52) * ((1 + (\text{Interest_rate_c} / 52))^{\text{Term_c}}))$$

##Check the syntax below whether the formula syntax is correct or not

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Rent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK type	BHK_type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent	Rent__c	Auto Number		
Rent Name	Name	Text(80)		✓
Rental City	Rental_City__c	Text(1)		

PROFILES

To create a new profile:

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (standard user is preferable) → enter profile name → save

2. .Enter a Profile Name

Click on the new created profile

4. While still on the profile page, then click

5. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile Edit

6. Sales Manager → Standard user Profile , Marketing Executive1 and Executive2 → Standard Platform User, Marketing Manager → Standard Platform User For

Search Setup

Setup

Home

Object Manager

profil

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

SETUP

Profiles

Profile

Standard User

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0]

Enabled Apex Class Access [0]

Enabled Visualforce Page Access [0]

Enabled External Data Source Access [0]

Enabled Named Credential Access [0]

Enabled Custom Metadata Type Access [0]

Enabled Custom Setting Definitions Access [0]

Enabled Flow Access [0]

Enabled Service Presence Status Access [0]

Enabled Custom Permissions [0]

Profile Detail

Edit

Clone

Delete

View Users

Name	Standard User
User License	Salesforce
Custom Profile	✓

NEW USER

Create User

1. Go to setup → type users in quick find
2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save box → select users → click New user

Home | Salesforce

User: Buyers s - Salesforce - Dev

mvvmuthaiahgovtartscollegefo-dev-ed.develop.my.salesforce.com/0052w00000H1Bfo?noredirect=1&isUserEntityOverride=1

Search

Switch to Lightning Experience

Saranya S

Setup

Help

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Home Chatter Libraries Content Subscriptions Buyers Rents Loans Students Marketins Sales Dashboards Lead with loan amounts

Quick Find / Search

Expand All Collapse All

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Permission Sets

Permission Set Groups

User Management Settings

Profiles

User Detail

Edit Sharing Reset Password Freeze

Name Buyers s

Alias bs

Email saranya7676@gmail.com

Username saranya111@gmail.com

Nickname User165113926290660833

Title

Company

Department

Division

Address

Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale English (India)

Language English

Delegated Approver

Manager

Receive Approval Request Emails Only if I am an approver

Federation ID

App Registration One-Time Password Authenticator

Role Salesforce Platform

User License Standard Platform User

Profile Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Mobile Push Registrations

Data.com User Type View

Accessibility Mode (Classic Only)

Debug Mode

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

PERMISSION SET

Create the Permission Sets

1. Go to setup → type “permission sets” in quick search → Select permission sets → New
2. Enter the label name → save
3. After saving the permission click on the Manage assignment
4. Now click on the Add Assignment
5. Now select the users and click on save
6. Go to permission set and add the access For Sales Rep3 give Access with Create permission for the User

IMG-20230410-WA0062.jpg

Home | Salesforce

New Custom Object | Salesforce

Permission Sets | Salesforce

Permission Sets - Salesforce - D |

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salesforce

Search

Search

Switch to Lightning Experience

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Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | Edit | Delete | Create New View

New

1-25 of 27

0 Selected

4 Previous

Next

Page 1 of 2

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to man...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud ...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact ce...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice conta...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager		Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, subloc...	Facility Manager
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service m...	Field Service Mobile
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License S...
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper	Limited access to Order Management features for Self S...	Lightning Order Management User

Type here to search

ENG

08:44

10-04-2023

IMG-20230410-WA0059.jpg

Home | Salesforce

New Custom Object | Salesforce

Permission Sets | Salesforce

Permission Set: Permission Set2

mvmuthaiahgovtartscollegefo-dev-ed.develop.my.salesforce.com/0P52w00000AMHoc

Switch to Lightning Experience

Saranya S

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Expand All

Collapse All

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Permission Set Groups

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Quick Groups

Permission Set

Permission Set2

Find Settings

Clone

Delete

Edit Properties

Manage Assignments

Permission Set Overview

Description

License

Session Activation Required

Last Modified By

API Name

Namespace Prefix

Created By

Permission_Set2

Saranya S

10/04/2023, 8:56 pm

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

Learn More

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

External Data Source Access

Permissions to authenticate against external data sources

Type here to search

ENG

08:44

10-04-2023

SETUP FOR OWD

Create OWD Setting

1. Setup, use the Quick Find box to find Sharing Settings.
2. Click Edit in the Organization-Wide Defaults area.
3. For each object, select the default access you want to give everyone.
4. To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for Lead, Rent custom object
5. Click Edit and from the Drop Down select private for internal and external
6. This Setting is for all the User Which have been Created

Quick Find / Search... 

Expand All | Collapse All



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Manage Territories

Sharing Settings

Help for this Page 

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults

Edit

Organization-Wide Defaults Help 

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Commission	Public Full Access	Private	✓

Home | Salesforce | Sharing Settings | Salesforce | Organization-Wide Sharing Defi...

mvmuthalahgovartartcollegefo-dev-ed.develop.my.salesforce.com/p/share/OrgDefaultSharing?id=00D2w00000RIH4H&retURL=%2Fp%2Fown%2FOrgSharingDetail%3Ffa...

Imports
Outbound Messages
Time-Based Workflow
Automated Process Actions
Case Escalations
Entitlement Processes
API Usage Notifications
Mass Emails
Email Snapshots
Jobs
Logs

Service Contract	Private	Private	
Service Resource	Public Read/Write	Private	
Service Territory	Public Read/Write	Private	
Shift	Private	Private	
Streaming Channel	Public Read/Write	Private	
Web Cart Document	Private	Private	
Work Order	Private	Private	
Work Plan	Private	Private	
Work Plan Template	Private	Private	
Work Step Template	Private	Private	
Work Type	Private	Private	
Work Type Group	Public Read/Write	Private	
Buy	Public Read/Write	Private	
Dashboard	Public Read/Write	Private	
Lead with loan amount	Public Read/Write	Private	
Loan	Private	Private	
Marketing	Private	Private	
Rent	Private	Private	
Sales	Private	Private	
Student	Private	Private	

Other Settings

Standard Report Visibility ☒ Manual User Record Sharing ☐ Manager Groups ☐ Secure guest user Require permission to view record access ☐ record names in lookup fields

Save Cancel

Copyright © 2000-2023 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance | Go to Salesforce mobile app

REPORTS

Create Report

1. Go to the app → click on the reports tab
2. Click New Report
3. Select report type from category or from report type panel or from search panel → click on start report
4. Customize your report, then save or run it

Create Report for following Condition

1. Create the Report of the Total Number of Loan Passed for for getting the Amount For the Property
2. The Condition should be Like Loan Amount \geq to 500

New Custom Object | SalesforceDashboard | SalesforceReports | Salesforce

mvmuthaiahgovtartscollegefo-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Search...

Property Managem...BuyersRentsLoansStudentsMarketinsSalesReportsDashboards

Reports

Recent

6 items

Search recent reports...

New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Sales		Private Reports	Saranya S	5/4/2023, 7:33 pm	
Created by Me	Marketins		Private Reports	Saranya S	5/4/2023, 7:32 pm	
Private Reports	Student		Private Reports	Saranya S	5/4/2023, 7:30 pm	
Public Reports	Loan Report		Private Reports	Saranya S	5/4/2023, 7:29 pm	
All Reports	Rent		Private Reports	Saranya S	5/4/2023, 7:26 pm	
	Buy		Private Reports	Saranya S	5/4/2023, 7:25 pm	
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

DASHBOARD

Create dashboards

1. Go to the App Launcher and select the Dashboards
2. Select add component
3. Select the folder select the following option new lead with loan Amount
4. Select in which format you want display chart

Create Dashboard

1. Create the Dashboard for the Same Take Any Type of Dashboard(Chart) And Display It on The App Home Page

Search...

★

+

🔊

?

⚙️

🔔

👤

Property Managem...

Buyers ▾

Rents ▾

Loans ▾

Students ▾


Marketins ▾

Sales ▾

Reports ▾

New Lead With Loan Amo... ▾ X

More ▾

 Dashboard

New Lead With Loan Amount

As of 10-Apr-2023, 9:50 am Viewing as Saranya S

Dashboards

Lead with loan amounts

Subscribe ▾

Loan Report

Loan: Loan Name ↑

Education loan

Home loan

View Report (Loan Report)

Student

Student: Student Name ↑

Santhosh

Saranya

View Report (Student)

Sales

Sales: Sales Name ↑

Home

Land

View Report (Sales)

Marketins

Rent

Buyers | Salesforce

mvmtuthaiahgovtartscollegefo-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000atxAEAQ/view

Search...

Property Managem...

Buyers

Rents

Loans

Students

Marketins

Sales

Reports

Dashboards

Lead with loan amounts

Buyers

Dashboard

Buyers

As of 10-Apr-2023, 9:54 am-Viewing as Saranya S

Refresh

Edit

Subscribe

Buy

Buy: Buy Name ↑

book

Jewellay

View Report (Buy)

Student

Student: Student Name ↑

Santhosh

Saranya

View Report (Student)

Sales

Sales: Sales Name ↑

Home

Land

View Report (Sales)

Marketins

Marketing: Marketing Name ↑

Adversiting

Sociel Media Marketing

View Report (Marketins)

Loan Report

Loan: Loan Name ↑

Education loan

Home loan

View Report (Loan Report)

CONCLUSION

Property management requires people from all different backgrounds to work as a high performing team. As the owner of the firm and senior leader, I must be committed to diversity by removing my bias about young women and men. Now that I am aware and acknowledge my bias, I can develop a strategic plan that aligns with the firm's goals. Social media can encourage prejudice therefore it should not be the primary source of identifying candidates. Hiring human resources professional to screen resumes and participate in interview selections will also help mitigate bias in the firm. To create a competitive firm with growth and diversity, leaders must acknowledge their bias perceptions and find ways to eliminate them.



THANK YOU