

Setting the Preferred Statement Type for a Landlord



This guide provides a straightforward process for setting the statement type for a Landlord and how this shows in the Statement Merge.

Setting the Preferred Statement Type

- 1 Navigate to the Landlord Record you are updating.

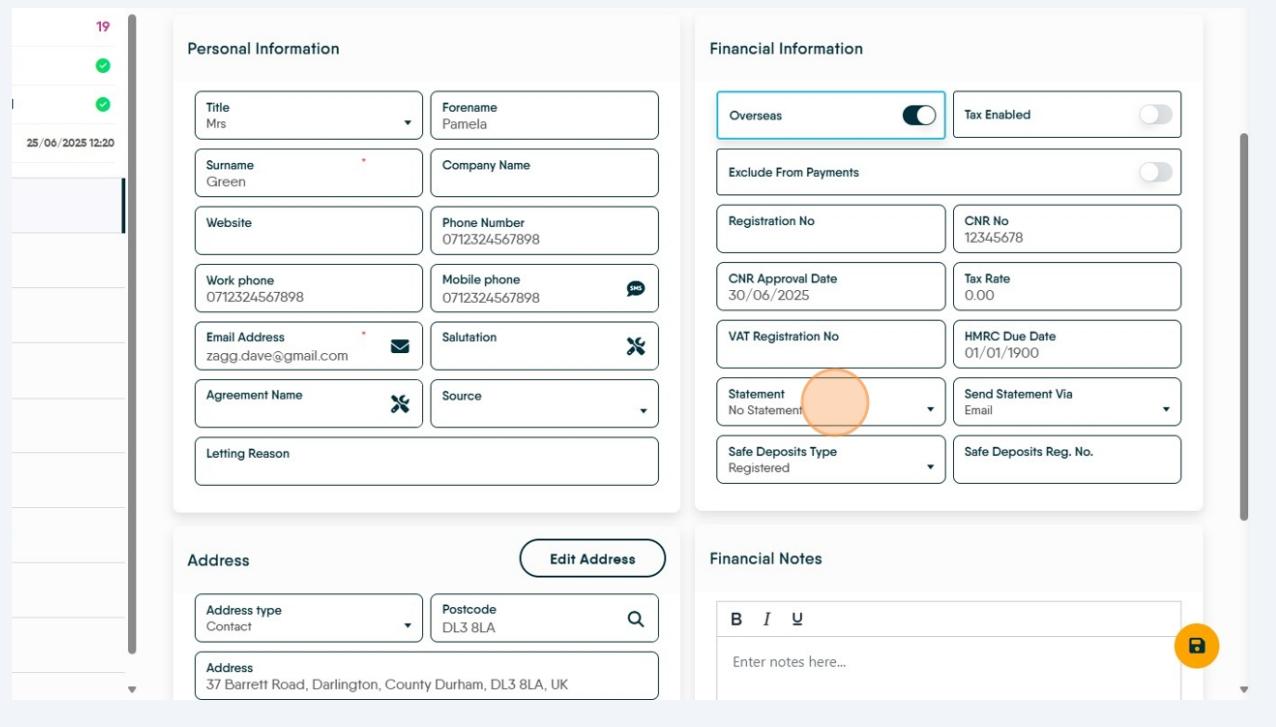
The screenshot shows the 'Personal Information' and 'Financial Information' sections of the landlord record. In the 'Financial Information' section, the 'Overseas' toggle switch is turned on (blue). The 'Statement' dropdown is set to 'No Statement'.

Personal Information		Financial Information	
Title: Mrs	Forename: Pamela	Overseas: <input checked="" type="checkbox"/>	Tax Enabled: <input type="checkbox"/>
Surname: Green	Company Name:	Exclude From Payments: <input type="checkbox"/>	
Website:	Phone Number: 0712324567898	Registration No:	CNR No: 12345678
Work phone: 0712324567898	Mobile phone: 0712324567898	CNR Approval Date: 30/06/2025	Tax Rate: 0.00
Email Address: zagg.dave@gmail.com	Salutation:	VAT Registration No:	HMRC Due Date: 01/01/1900
Agreement Name:	Source:	Statement: No Statement	Send Statement Via Email: <input type="checkbox"/>
Letting Reason:		Safe Deposits Type: Registered	Safe Deposits Reg. No:

Address: Address type: Contact, Postcode: N1 3 RA, Edit Address, Search icon.

Financial Notes: B, I, U

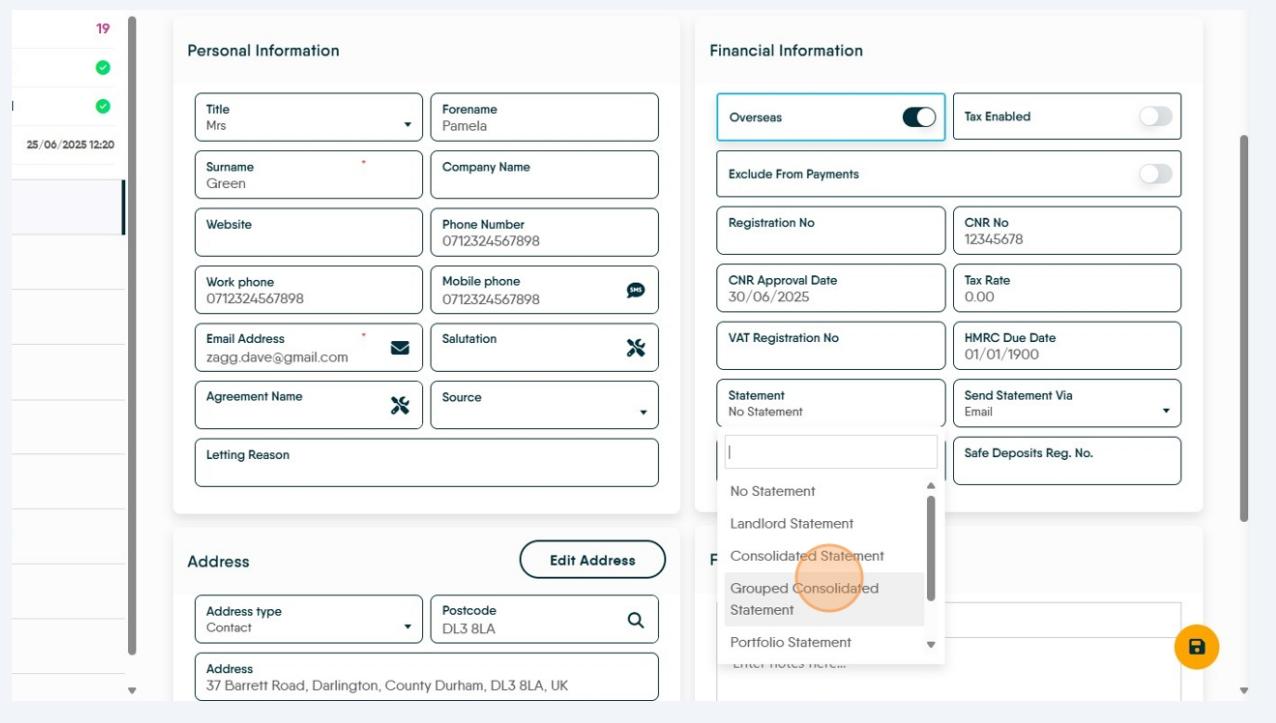
2 Click into the Statement field



The screenshot shows a software interface for managing personal and financial information. The 'Personal Information' section includes fields for Title (Mrs), Forename (Pamela), Surname (Green), Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address, Salutation, Agreement Name, Source, and Letting Reason. The 'Financial Information' section includes fields for Overseas (switched on), Tax Enabled (switched off), Exclude From Payments, Registration No, CNR No, CNR Approval Date (30/06/2025), Tax Rate (0.00), VAT Registration No, HMRC Due Date (01/01/1900), Statement (a dropdown menu with 'No Statement' selected, highlighted with a red circle), Send Statement Via (Email), Safe Deposits Type (Registered), and Safe Deposits Reg. No. The 'Address' section shows an address type of 'Contact' and a postcode of 'DL3 8LA'. The 'Financial Notes' section has a text input field with placeholder 'Enter notes here...' and a lock icon.

3 From the drop down menu, select the statement type you are using.

In this case we have selected "Grouped Consolidated Statement"



The screenshot shows the 'Statement' dropdown menu open, displaying options: No Statement, Landlord Statement, Consolidated Statement, Grouped Consolidated Statement (highlighted with a red circle), and Portfolio Statement. The other options are dimmed. The rest of the interface is identical to the previous screenshot, showing personal and financial information sections and an address.

4

Click into the Send Statement Via field and select the preferred option.
Click "Email" or "Letter"

Personal Information

Financial Information

Overseas Tax Enabled

Exclude From Payments

Registration No. CNR No. 12345678

CNR Approval Date 30/06/2025 Tax Rate 0.00

VAT Registration No. HMRC Due Date 01/01/1900

Statement Grouped Consolidated Statement Send Statement Via Email

Safe Deposits Type Registered Safe Deposits Reg. No.

Address

Address type Contact Postcode DL3 8LA

Address 37 Barrett Road, Darlington, County Durham, DL3 8LA, UK

Financial Notes

B I U

Enter notes here...

Personal Information

Financial Information

Overseas Tax Enabled

Exclude From Payments

Registration No. CNR No. 12345678

CNR Approval Date 30/06/2025 Tax Rate 0.00

VAT Registration No. HMRC Due Date 01/01/1900

Statement Grouped Consolidated Statement Send Statement Via Email

Safe Deposits Type Registered Letter Email

Address

Address type Contact Postcode DL3 8LA

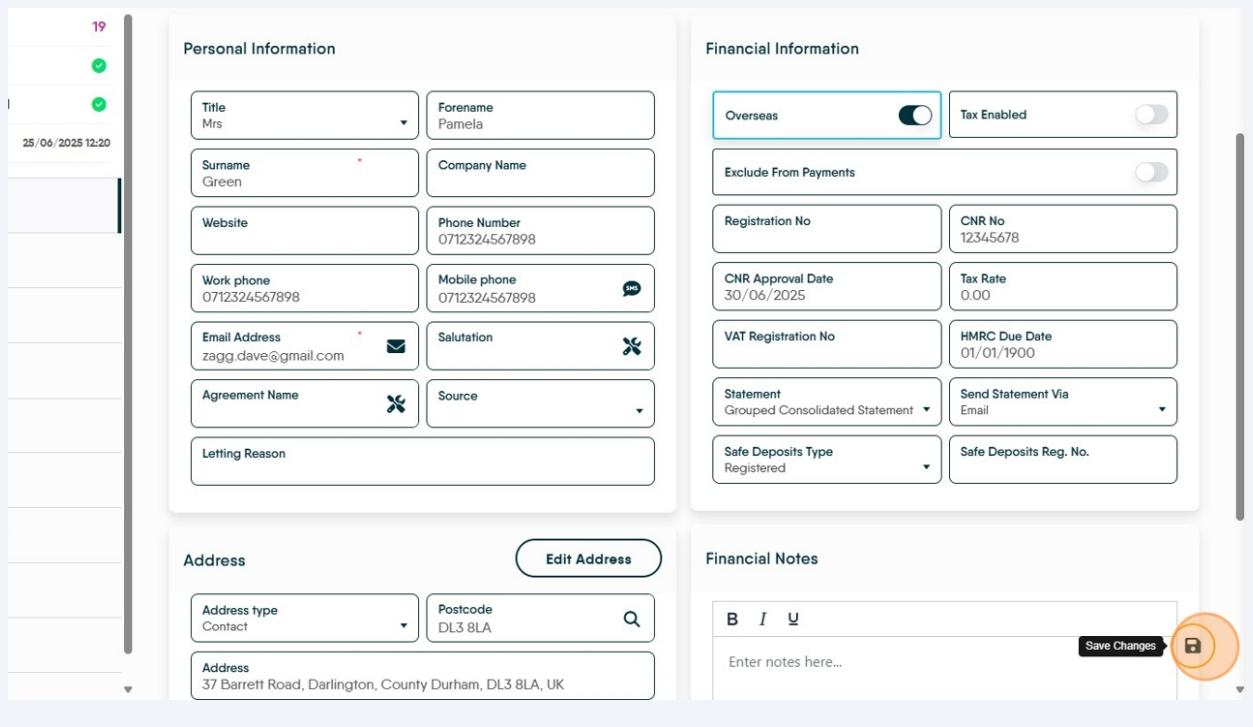
Address 37 Barrett Road, Darlington, County Durham, DL3 8LA, UK

Financial Notes

B I U

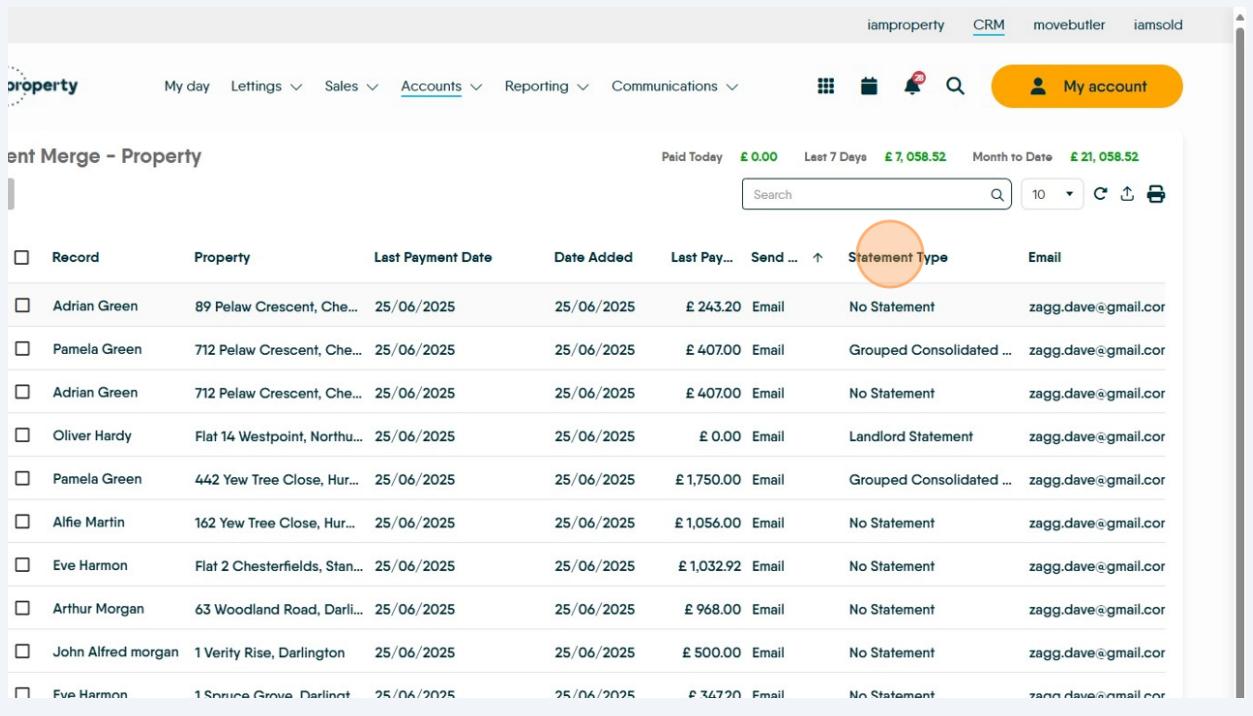
Enter notes here...

5 Click here.



The screenshot shows a landlord profile edit screen. On the left, there's a sidebar with a list of 19 items, some with green checkmarks. The main area is divided into sections: **Personal Information** (Title: Mrs, Forename: Pamela, Surname: Green, Website: [redacted], Work phone: 0712324567898, Mobile phone: 0712324567898, Email Address: zagg.dave@gmail.com, Agreement Name: [redacted], Salutation: [redacted], Source: [redacted], Letting Reason: [redacted]), **Financial Information** (Overseas: , Tax Enabled: , Exclude From Payments: , Registration No: [redacted], CNR No: 12345678, CNR Approval Date: 30/06/2025, Tax Rate: 0.00, VAT Registration No: [redacted], HMRC Due Date: 01/01/1900, Statement: Grouped Consolidated Statement, Send Statement Via: Email, Safe Deposits Type: Registered, Safe Deposits Reg. No: [redacted]), **Address** (Address type: Contact, Postcode: DL3 8LA, Address: 37 Barrett Road, Darlington, County Durham, DL3 8LA, UK), and **Financial Notes** (B, I, U buttons, Save Changes button, a text input field for notes, and a circled orange 'Save Changes' button).

6 In the Statement Merge screen the Landlords can be sorted by clicking on the 'Statement Type' header which will sort all the records into order.



The screenshot shows the Statement Merge - Property screen. The top navigation bar includes links for property, My day, Lettings, Sales, Accounts (underlined), Reporting, Communications, and My account. The main area shows a table of landlords with the following columns: Record, Property, Last Payment Date, Date Added, Last Pay..., Send ..., Statement Type (which is circled in orange), and Email. The landlords listed are: Adrian Green (89 Pelaw Crescent, Chester-le-Street, 25/06/2025, 25/06/2025, £243.20, Email, No Statement, zagg.dave@gmail.com), Pamela Green (712 Pelaw Crescent, Chester-le-Street, 25/06/2025, 25/06/2025, £407.00, Email, Grouped Consolidated Statement, zagg.dave@gmail.com), Adrian Green (712 Pelaw Crescent, Chester-le-Street, 25/06/2025, 25/06/2025, £407.00, Email, No Statement, zagg.dave@gmail.com), Oliver Hardy (Flat 14 Westpoint, Northgate, 25/06/2025, 25/06/2025, £0.00, Email, Landlord Statement, zagg.dave@gmail.com), Pamela Green (442 Yew Tree Close, Hurst Green, 25/06/2025, 25/06/2025, £1,750.00, Email, Grouped Consolidated Statement, zagg.dave@gmail.com), Alfie Martin (162 Yew Tree Close, Hurst Green, 25/06/2025, 25/06/2025, £1,056.00, Email, No Statement, zagg.dave@gmail.com), Eve Harmon (Flat 2 Chesterfields, Stanhope, 25/06/2025, 25/06/2025, £1,032.92, Email, No Statement, zagg.dave@gmail.com), Arthur Morgan (63 Woodland Road, Darlington, 25/06/2025, 25/06/2025, £968.00, Email, No Statement, zagg.dave@gmail.com), John Alfred morgan (1 Verity Rise, Darlington, 25/06/2025, 25/06/2025, £500.00, Email, No Statement, zagg.dave@gmail.com), and Eve Harmon (1 Service Grove, Darlington, 25/06/2025, 25/06/2025, £347.20, Email, No Statement, zagg.dave@gmail.com).

7 Click this checkbox and select the records you are sending statements to.

Statement Merge - Property

Record	Property	Last Payment Date	Date Added	Last Pa...	Send Via	Statement Type	Email
<input type="checkbox"/> Pamela Green	3 Yew Tree Close, Hurwo...	27/09/2023	27/09/2023	£ 880.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input type="checkbox"/> Pamela Green	2 Kingsway, Darlington			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input type="checkbox"/> Pamela Green	2 Whitefields Gate, Rich...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input type="checkbox"/> Pamela Green	7117 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input type="checkbox"/> Pamela Green	7278 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input type="checkbox"/> Pamela Green	744 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input type="checkbox"/> Pamela Green	75 Pelaw Crescent, Ches...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input type="checkbox"/> Pamela Green	867 Pelaw Crescent, Che...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input checked="" type="checkbox"/> Pamela Green	97 Yew Tree Close, Hurw...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input checked="" type="checkbox"/> Oliver Hardy	Flat 14 Westpoint, Northu...	25/06/2025	25/06/2025	£ 0.00	Email	Landlord Statement	zagg.dave@gmai

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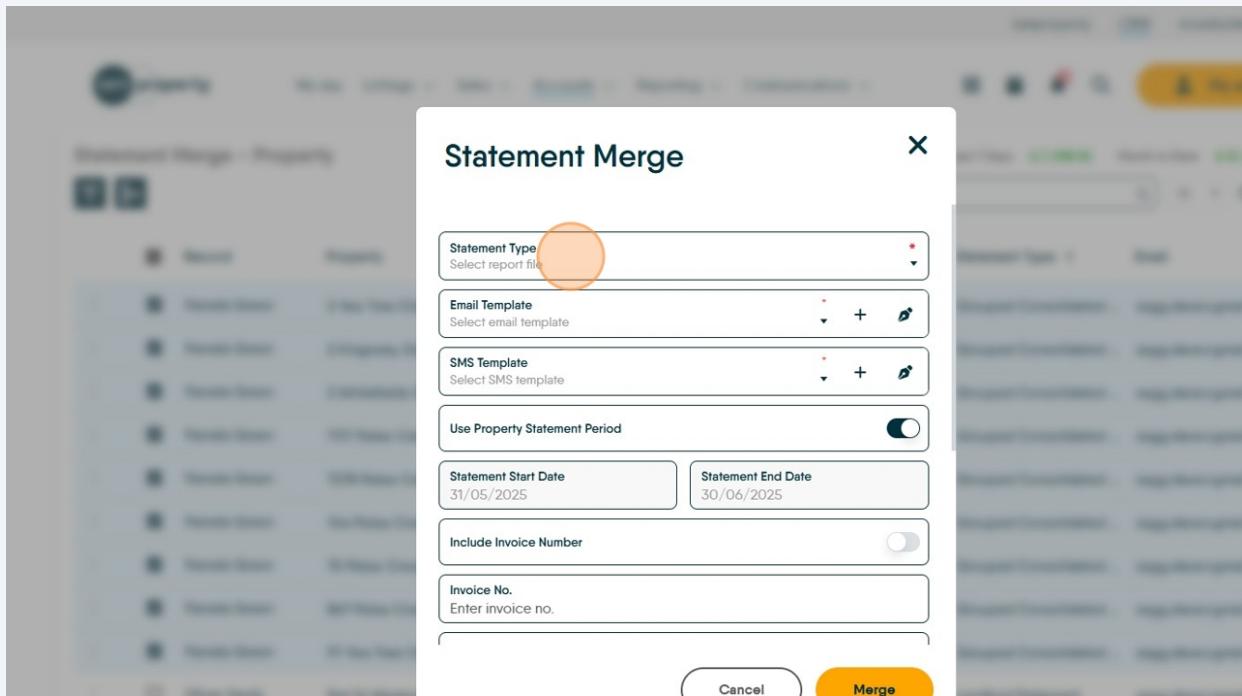
[Statement Merge](#)

8 Once sorted and selected, click the Statement Merge icon to create the statement merge.

Statement Merge - Property

Record	Property	Last Payment Date	Date Added	Last Pa...	Send Via	Statement Type	Email
<input checked="" type="checkbox"/> Pamela Green	3 Yew Tree Close, Hurwo...	27/09/2023	27/09/2023	£ 880.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input checked="" type="checkbox"/> Pamela Green	2 Kingsway, Darlington			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input checked="" type="checkbox"/> Pamela Green	2 Whitefields Gate, Rich...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input checked="" type="checkbox"/> Pamela Green	7117 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input checked="" type="checkbox"/> Pamela Green	7278 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input checked="" type="checkbox"/> Pamela Green	744 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input checked="" type="checkbox"/> Pamela Green	75 Pelaw Crescent, Ches...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input checked="" type="checkbox"/> Pamela Green	867 Pelaw Crescent, Che...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input checked="" type="checkbox"/> Pamela Green	97 Yew Tree Close, Hurw...			£ 0.00	Email	Grouped Consolidated ...	zagg.dave@gmai
<input type="checkbox"/> Oliver Hardy	Flat 14 Westpoint, Northu...	25/06/2025	25/06/2025	£ 0.00	Email	Landlord Statement	zagg.dave@gmai

9 Click "Select report file" you are using for the selected Landlords.



10 Once the options are set, click Merge to send the messages.

