

# 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.

iam property

My day Lettings Sales Accounts Reporting Communications

98

19

Confirmed

Confirmed

tacted 25/06/2025 12:20

Details

Checklist

Properties

Portfolios

enancies

Contacts

Documents

Journal

Personal Information

TitleMrs

ForenamePamela

SurnameGreen

Company Name

Website

Phone Number0712324567898

Work phone0712324567898

Mobile phone0712324567898

Email Addresszagg.dave@gmail.com

Salutation

Agreement Name

Source

Letting Reason

Address

Address typeContact

PostcodeDL3 9L A

Edit Address

Financial Information

Overseas

Tax Enabled

Exclude From Payments

Registration No

CNR No12345678

CNR Approval Date30/06/2025

Tax Rate0.00

VAT Registration No

HMRC Due Date01/01/1900

StatementNo Statement

Send Statement ViaEmail

Safe Deposits TypeRegistered

Safe Deposits Reg. No.

Financial Notes

B I U

1

## 2 Click into the Statement field

The screenshot shows a form with two main sections: 'Personal Information' and 'Financial Information'. The 'Personal Information' section includes fields for Title (Mrs), Forename (Pamela), Surname (Green), Company Name, Website, Phone Number (0712324567898), Mobile phone (0712324567898), Work phone (0712324567898), Email Address (zagg.dave@gmail.com), Salutation, Agreement Name, Source, and Letting Reason. The 'Financial Information' section includes fields for Overseas (toggle), Tax Enabled (toggle), Exclude From Payments (toggle), 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 (No Statement), Send Statement Via (Email), Safe Deposits Type (Registered), and Safe Deposits Reg. No. The 'Statement' dropdown menu is highlighted with an orange circle.

**Personal Information**

Title Mrs	Forename Pamela
Surname Green	Company Name
Website	Phone Number 0712324567898
Work phone 0712324567898	Mobile phone 0712324567898
Email Address zagg.dave@gmail.com	Salutation
Agreement Name	Source
Letting Reason	

**Address** [Edit Address](#)

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

**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 No Statement	Send Statement Via Email
Safe Deposits Type Registered	Safe Deposits Reg. No.

**Financial Notes**

B I U

Enter notes here...

## 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 same form as before, but with the 'Statement' dropdown menu open. The dropdown menu lists the following options: No Statement, Landlord Statement, Consolidated Statement, Grouped Consolidated Statement (highlighted with an orange circle), and Portfolio Statement.

**Personal Information**

Title Mrs	Forename Pamela
Surname Green	Company Name
Website	Phone Number 0712324567898
Work phone 0712324567898	Mobile phone 0712324567898
Email Address zagg.dave@gmail.com	Salutation
Agreement Name	Source
Letting Reason	

**Address** [Edit Address](#)

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

**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 No Statement	Send Statement Via Email
Safe Deposits Type Registered	Safe Deposits Reg. No.

**Financial Notes**

B I U

Enter notes here...

4

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

The screenshot displays a web form with the following sections:

- Personal Information:** Fields for Title (Mrs), Forename (Pamela), Surname (Green), Company Name, Website, Phone Number (0712324567898), Mobile phone (0712324567898), Work phone (0712324567898), Email Address (zagg.dave@gmail.com), Salutation, Agreement Name, Source, and Letting Reason.
- Financial Information:** Fields for Overseas (toggle), Tax Enabled (toggle), Exclude From Payments (toggle), 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), and Safe Deposits Reg. No.
- Address:** Fields for Address type (Contact), Postcode (DL3 8LA), and Address (37 Barrett Road, Darlington, County Durham, DL3 8LA, UK).
- Financial Notes:** A text area for notes with a toolbar (B, I, U) and a save icon.

The 'Send Statement Via' dropdown is highlighted with an orange circle, and a dropdown menu is shown with 'Email' and 'Letter' options.

## 5 Click here.

19  
25/06/2025 12:20

### Personal Information

Title  
Mrs

Forename  
Pamela

Surname  
Green

Company Name

Website

Phone Number  
0712324567898

Work phone  
0712324567898

Mobile phone  
0712324567898

Email Address  
zagg.dave@gmail.com

Salutation

Agreement Name

Source

Letting Reason

### 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

Edit 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...

Save Changes

## 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.

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property

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Statement Merge - Property

Paid Today £ 0.00 Last 7 Days £ 7,058.52 Month to Date £ 21,058.52

Search

10

<input type="checkbox"/>	Record	Property	Last Payment Date	Date Added	Last Pay...	Send ...	Statement Type	Email
<input type="checkbox"/>	Adrian Green	89 Pelaw Crescent, Che...	25/06/2025	25/06/2025	£ 243.20	Email	No Statement	zagg.dave@gmail.cor
<input type="checkbox"/>	Pamela Green	712 Pelaw Crescent, Che...	25/06/2025	25/06/2025	£ 407.00	Email	Grouped Consolidated ...	zagg.dave@gmail.cor
<input type="checkbox"/>	Adrian Green	712 Pelaw Crescent, Che...	25/06/2025	25/06/2025	£ 407.00	Email	No Statement	zagg.dave@gmail.cor
<input type="checkbox"/>	Oliver Hardy	Flat 14 Westpoint, Northu...	25/06/2025	25/06/2025	£ 0.00	Email	Landlord Statement	zagg.dave@gmail.cor
<input type="checkbox"/>	Pamela Green	442 Yew Tree Close, Hur...	25/06/2025	25/06/2025	£ 1,750.00	Email	Grouped Consolidated ...	zagg.dave@gmail.cor
<input type="checkbox"/>	Alfie Martin	162 Yew Tree Close, Hur...	25/06/2025	25/06/2025	£ 1,056.00	Email	No Statement	zagg.dave@gmail.cor
<input type="checkbox"/>	Eve Harmon	Flat 2 Chesterfields, Stan...	25/06/2025	25/06/2025	£ 1,032.92	Email	No Statement	zagg.dave@gmail.cor
<input type="checkbox"/>	Arthur Morgan	63 Woodland Road, Darli...	25/06/2025	25/06/2025	£ 968.00	Email	No Statement	zagg.dave@gmail.cor
<input type="checkbox"/>	John Alfred morgan	1 Verity Rise, Darlington	25/06/2025	25/06/2025	£ 500.00	Email	No Statement	zagg.dave@gmail.cor
<input type="checkbox"/>	Eve Harmon	1 Spruce Grove, Darlont	25/06/2025	25/06/2025	£ 347.20	Email	No Statement	zagg.dave@gmail.cor

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

**Statement Merge - Property**

Paid Today £ 0.00 Last 7 Days £ 7,058.52 Month to Date £ 21,05

Search 10

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@gmail
<input type="checkbox"/>	Pamela Green	2 Kingsway, Darlington			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input type="checkbox"/>	Pamela Green	2 Whitefields Gate, Rich...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input type="checkbox"/>	Pamela Green	7117 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input type="checkbox"/>	Pamela Green	7278 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input type="checkbox"/>	Pamela Green	744 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input type="checkbox"/>	Pamela Green	75 Pelaw Crescent, Ches...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input type="checkbox"/>	Pamela Green	867 Pelaw Crescent, Che...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input checked="" type="checkbox"/>	Pamela Green	97 Yew Tree Close, Hurw...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input checked="" type="checkbox"/>	Oliver Hardy	Flat 14 Westpoint, Northu...	25/06/2025	25/06/2025	£ 0.00	Email	Landlord Statement zagg.dave@gmail

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Statement Merge X

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

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**Statement Merge - Property**

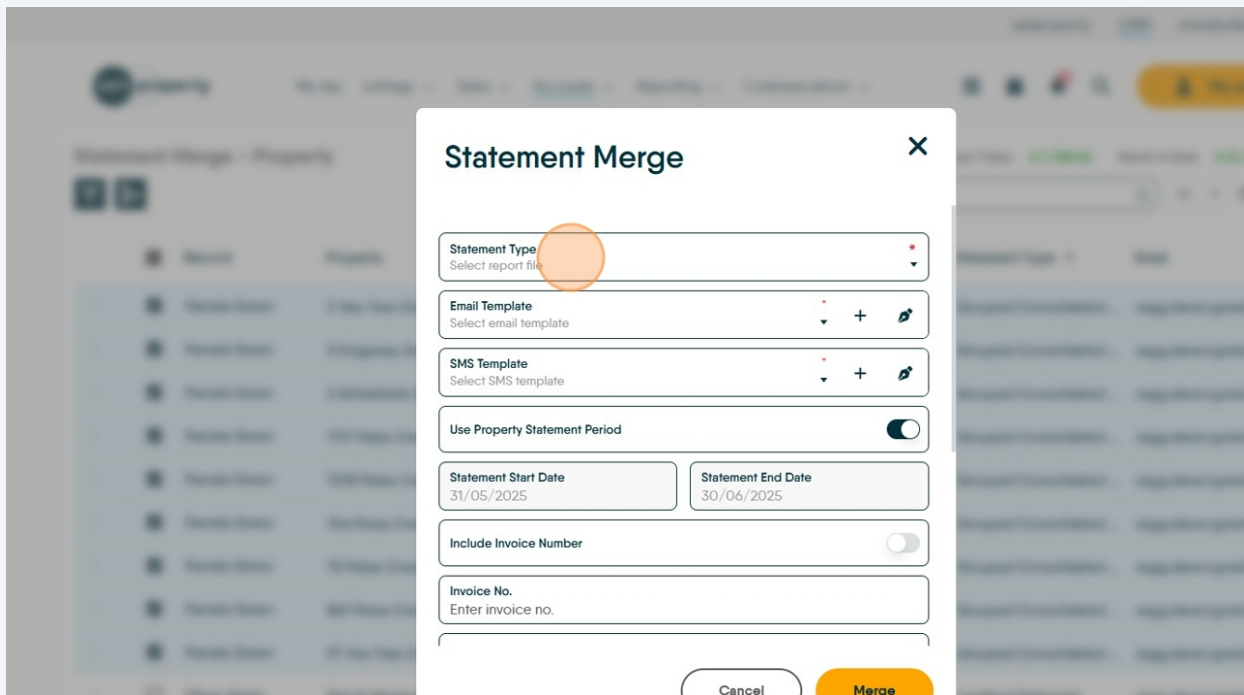
Paid Today £ 0.00 Last 7 Days £ 7,058.52 Month to Date £ 21,05

Search 10

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@gmail
<input checked="" type="checkbox"/>	Pamela Green	2 Kingsway, Darlington			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input checked="" type="checkbox"/>	Pamela Green	2 Whitefields Gate, Rich...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input checked="" type="checkbox"/>	Pamela Green	7117 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input checked="" type="checkbox"/>	Pamela Green	7278 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input checked="" type="checkbox"/>	Pamela Green	744 Pelaw Crescent, Ch...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input checked="" type="checkbox"/>	Pamela Green	75 Pelaw Crescent, Ches...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input checked="" type="checkbox"/>	Pamela Green	867 Pelaw Crescent, Che...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input checked="" type="checkbox"/>	Pamela Green	97 Yew Tree Close, Hurw...			£ 0.00	Email	Grouped Consolidated ... zagg.dave@gmail
<input type="checkbox"/>	Oliver Hardy	Flat 14 Westpoint, Northu...	25/06/2025	25/06/2025	£ 0.00	Email	Landlord Statement zagg.dave@gmail



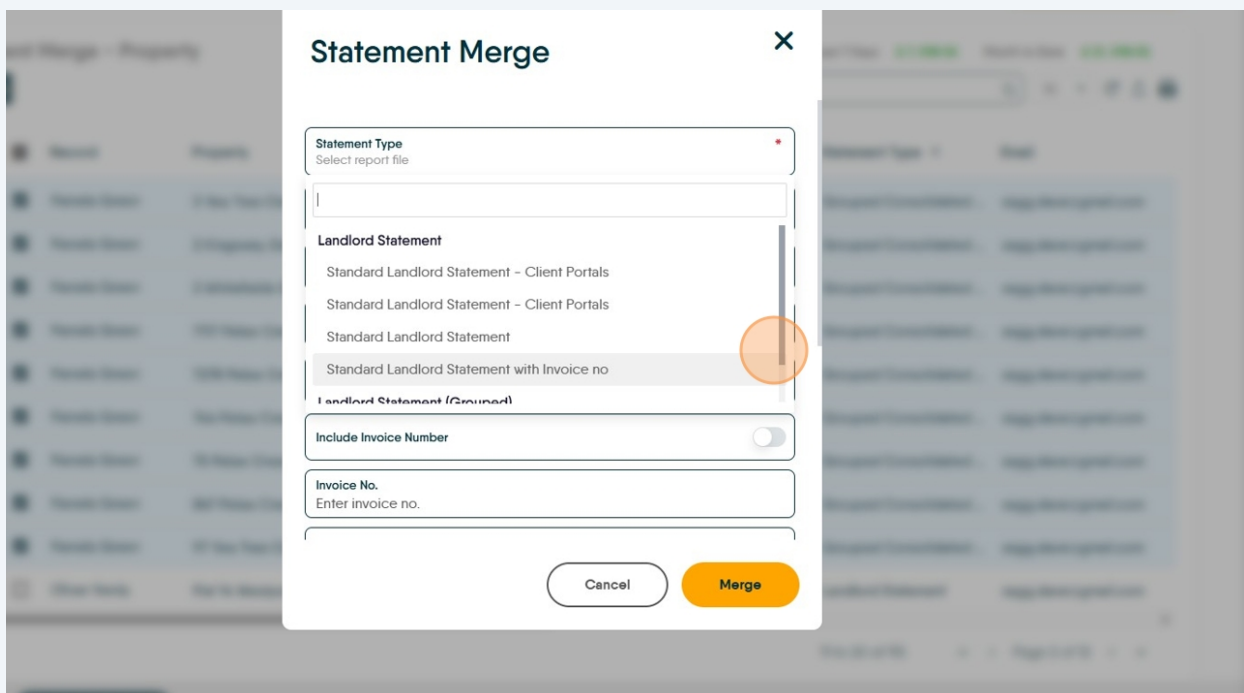
- 9 Click "Select report file" you are using for the selected Landlords.



The screenshot shows a 'Statement Merge' dialog box overlaid on a blurred background of a property management interface. The dialog box contains the following fields and controls:

- Statement Type:** A dropdown menu with the text 'Select report file' below it. An orange circle highlights this dropdown.
- Email Template:** A dropdown menu with the text 'Select email template' below it, accompanied by a plus icon and a refresh icon.
- SMS Template:** A dropdown menu with the text 'Select SMS template' below it, accompanied by a plus icon and a refresh icon.
- Use Property Statement Period:** A toggle switch that is currently turned on.
- Statement Start Date:** A date field showing '31/05/2025'.
- Statement End Date:** A date field showing '30/06/2025'.
- Include Invoice Number:** A toggle switch that is currently turned off.
- Invoice No.:** A text field with the placeholder text 'Enter invoice no.'.
- Buttons:** 'Cancel' and 'Merge' buttons at the bottom right.

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



This screenshot shows the 'Statement Merge' dialog box with the 'Statement Type' dropdown expanded, revealing a list of options. An orange circle highlights the list. The options are:

- Landlord Statement**
  - Standard Landlord Statement - Client Portals
  - Standard Landlord Statement - Client Portals
  - Standard Landlord Statement
  - Standard Landlord Statement with Invoice no
- Landlord Statement (Grouped)**

The other fields and controls from the previous screenshot are visible but not highlighted.