

Generating a Bespoke Landlord Statement in CRM to Include Contractor Invoices

This guide provides a straightforward approach to generating a Bespoke Landlord Statement using Statement Merge in the Accounts module of the CRM.

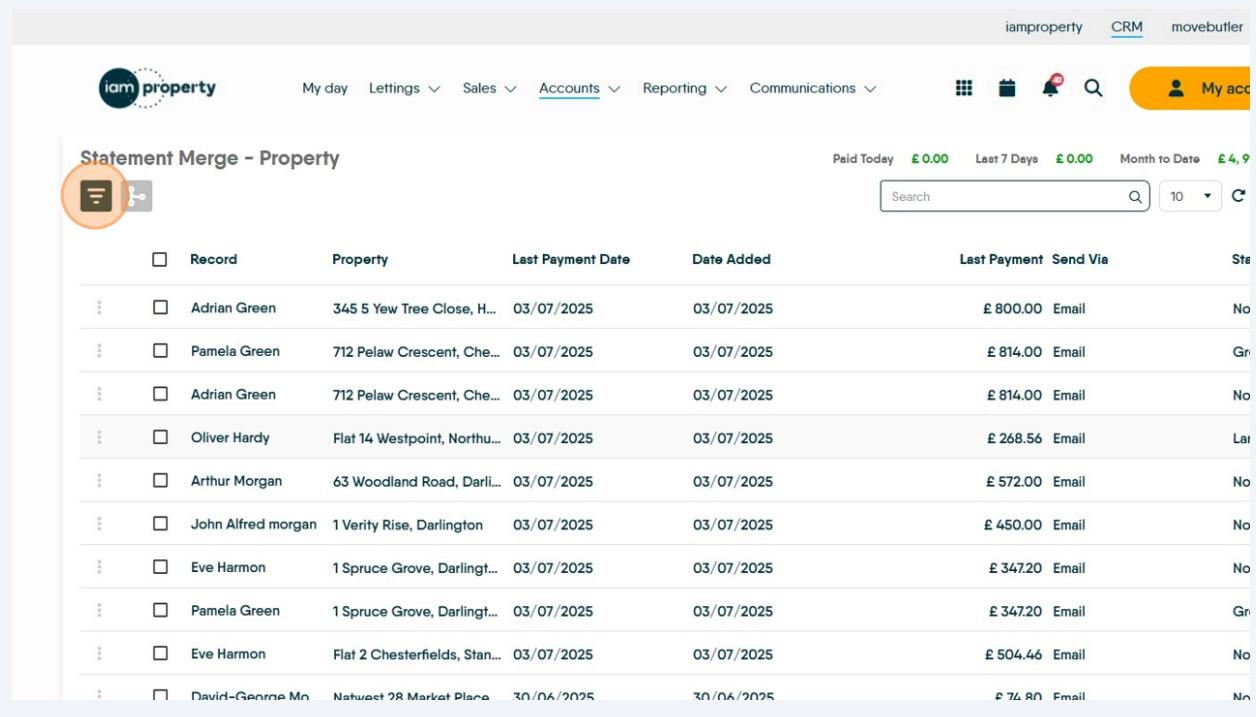
By following the concise steps outlined, users can efficiently create and customise their statements, ensuring accurate financial reporting. Accessing this guide will streamline your property management tasks, save time, and enhance your professionalism in dealing with landlords.



This guide concentrates on making sure Contractor Invoices are added to a Statement Merge, when the Invoice was added in the last statement prior (i.e. before the Statement Merge start date) and charged in this statement period

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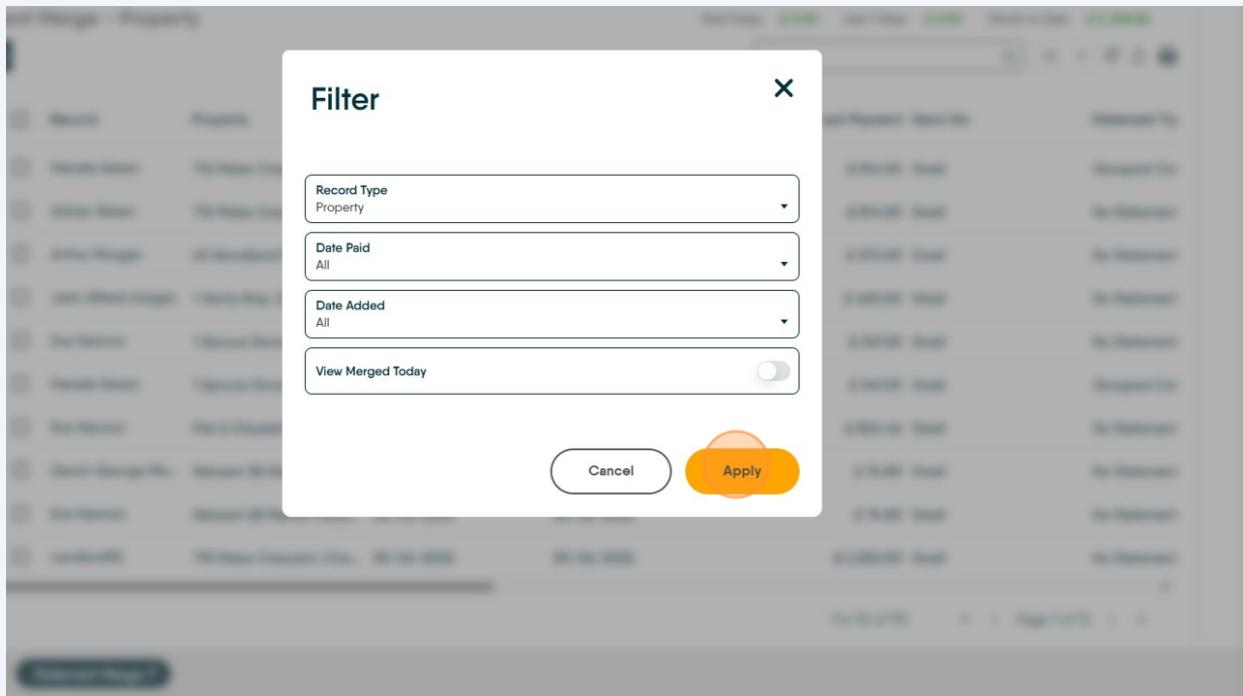
Navigate to <https://crm.iamproperty.com/Dashboards/Accounts?showTab=AccountsStatementMergeTab&tabType=landlord> Click the icon to filter the information on screen.



Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	Status
Adrian Green	345 5 Yew Tree Close, H...	03/07/2025	03/07/2025	£ 800.00	Email	No
Pamela Green	712 Pelaw Crescent, Che...	03/07/2025	03/07/2025	£ 814.00	Email	Gr...
Adrian Green	712 Pelaw Crescent, Che...	03/07/2025	03/07/2025	£ 814.00	Email	No
Oliver Hardy	Flat 14 Westpoint, North...	03/07/2025	03/07/2025	£ 268.56	Email	Lar...
Arthur Morgan	63 Woodland Road, Darli...	03/07/2025	03/07/2025	£ 572.00	Email	No
John Alfred morgan	1 Verity Rise, Darlington	03/07/2025	03/07/2025	£ 450.00	Email	No
Eve Harmon	1 Spruce Grove, Darlingt...	03/07/2025	03/07/2025	£ 347.20	Email	No
Pamela Green	1 Spruce Grove, Darlingt...	03/07/2025	03/07/2025	£ 347.20	Email	Gr...
Eve Harmon	Flat 2 Chesterfields, Stan...	03/07/2025	03/07/2025	£ 504.46	Email	No
David-George Mo	Natureet 28 Market Place	30/06/2025	30/06/2025	£ 74.80	Email	No

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Once options are selected click the "Apply" button or "Cancel" to move away.



Alert! to make sure the Contractor Invoices are attached correctly make sure the date the Invoice was uploaded to the CRM is within the dates set for the Statement Merge e.g. there may be a contractor invoice uploaded before the last Statement was created and charged to the Landlord in this statement period. In this case the Landlord would be charged and the Invoice not uploaded to the statement merge.

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At the right side (scroll right) of the statement merge screen you can see when the last Statement was sent and when the last Statement Merge was run. It is important to check these dates to make sure records are accurate.

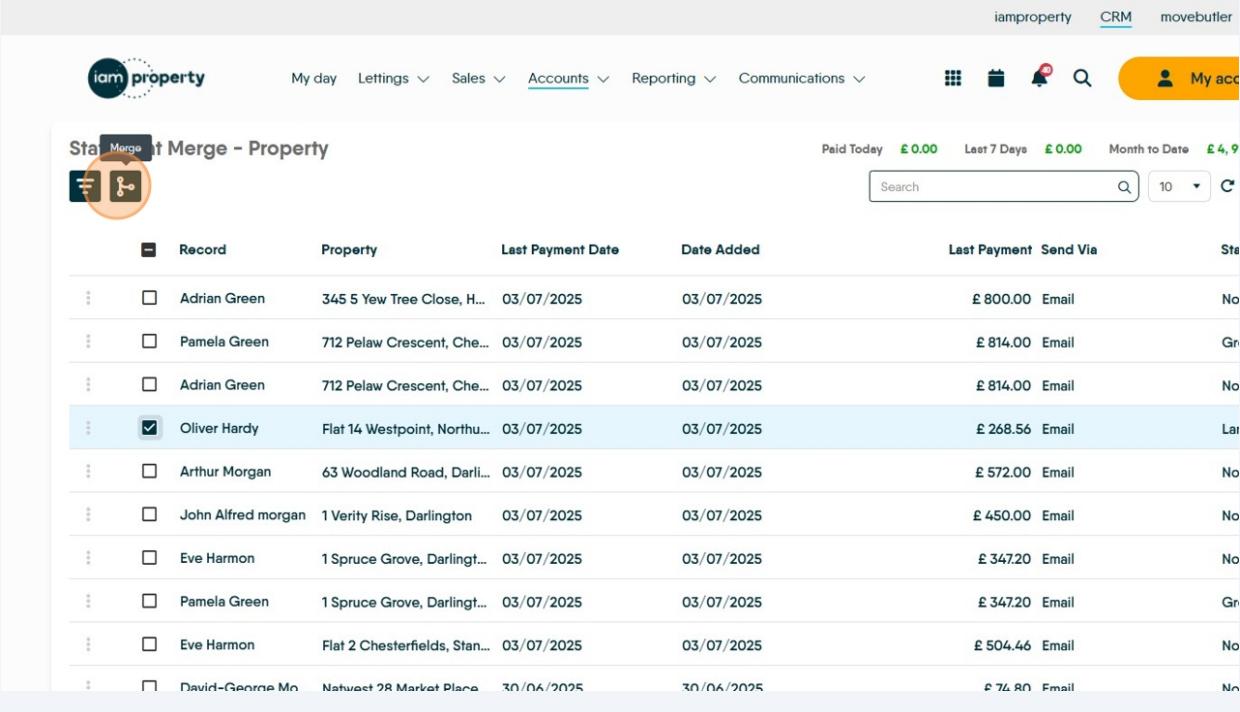
Mobile	Address	Statement Start	Statement End	Current Balance	Statement No.	Last Statement Merge
712324567898	37 Barrett Road, Darlington	26/06/2025	25/07/2025	£ 0.00	33	25/06/2025
7863525455	1111 Kingsway, Darlington	26/06/2025	25/07/2025	£ 0.00	33	25/06/2025
7788996666	41 Barrett Road, Darlington	10/06/2025	25/07/2025	£ 1,510.00	54	09/06/2025
		10/06/2025	25/07/2025	£ 0.00	25	09/06/2025
789564215	3 St Claires Close, Keswick	10/06/2025	25/07/2025	£ 0.00	39	09/06/2025
712324567898	37 Barrett Road, Darlington	10/06/2025	25/07/2025	£ 0.00	39	09/06/2025
789564215	3 St Claires Close, Keswick	10/06/2025	25/07/2025	£ 0.00	32	09/06/2025
7845 325698	35 Yew Tree Close, Hurworth	02/05/2024	25/07/2025	£ 0.00	3	01/05/2024
789564215	3 St Claires Close, Keswick	02/05/2024	25/07/2025	£ 0.00	3	01/05/2024
		25/03/2025	25/07/2025	£ 0.00	2	24/03/2025

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Select the Landlord you are sending the statement to.

Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	St
Adrian Green	345 5 Yew Tree Close, Hurworth	03/07/2025	03/07/2025	£ 800.00	Email	No
Pamela Green	712 Pelaw Crescent, Chester-le-Street	03/07/2025	03/07/2025	£ 814.00	Email	Gr
Adrian Green	712 Pelaw Crescent, Chester-le-Street	03/07/2025	03/07/2025	£ 814.00	Email	No
Oliver Hardy	Flat 14 Westpoint, Northgate	03/07/2025	03/07/2025	£ 268.56	Email	Lai
Arthur Morgan	63 Woodland Road, Darlington	03/07/2025	03/07/2025	£ 572.00	Email	No
John Alfred morgan	1 Verity Rise, Darlington	03/07/2025	03/07/2025	£ 450.00	Email	No
Eve Harmon	1 Spruce Grove, Darlington	03/07/2025	03/07/2025	£ 347.20	Email	No
Pamela Green	1 Spruce Grove, Darlington	03/07/2025	03/07/2025	£ 347.20	Email	Gr
Eve Harmon	Flat 2 Chesterfields, Stanhope	03/07/2025	03/07/2025	£ 504.46	Email	No
David-George Morris	Natwest 28 Market Place, Darlington	30/06/2025	30/06/2025	£ 74.80	Email	No

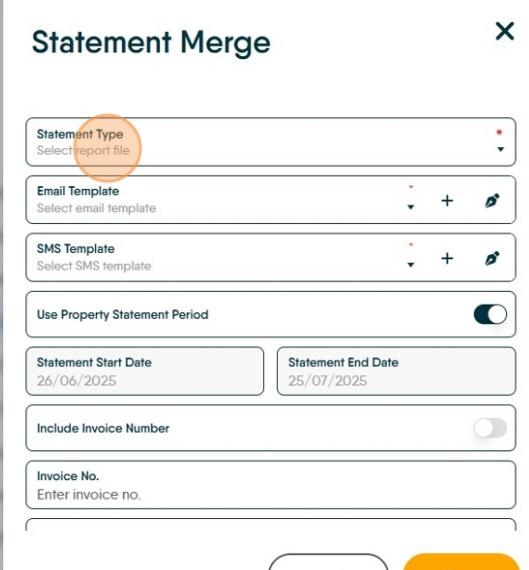
5 Click here.



Statement Merge - Property

Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	Start Date
<input type="checkbox"/> Adrian Green	345 5 Yew Tree Close, H...	03/07/2025	03/07/2025	£ 800.00	Email	No
<input type="checkbox"/> Pamela Green	712 Pelaw Crescent, Che...	03/07/2025	03/07/2025	£ 814.00	Email	Green
<input type="checkbox"/> Adrian Green	712 Pelaw Crescent, Che...	03/07/2025	03/07/2025	£ 814.00	Email	No
<input checked="" type="checkbox"/> Oliver Hardy	Flat 14 Westpoint, Northu...	03/07/2025	03/07/2025	£ 268.56	Email	Last
<input type="checkbox"/> Arthur Morgan	63 Woodland Road, Darli...	03/07/2025	03/07/2025	£ 572.00	Email	No
<input type="checkbox"/> John Alfred morgan	1 Verity Rise, Darlington	03/07/2025	03/07/2025	£ 450.00	Email	No
<input type="checkbox"/> Eve Harmon	1 Spruce Grove, Darlingt...	03/07/2025	03/07/2025	£ 347.20	Email	No
<input type="checkbox"/> Pamela Green	1 Spruce Grove, Darlingt...	03/07/2025	03/07/2025	£ 347.20	Email	Green
<input type="checkbox"/> Eve Harmon	Flat 2 Chesterfields, Stan...	03/07/2025	03/07/2025	£ 504.46	Email	No
<input type="checkbox"/> David-George Mo	Natureet 28 Market Place	20/06/2025	20/06/2025	£ 74.80	Email	No

6 Click "Select report file" this is the type of statement you are sending to your Landlord.
Click "Standard Landlord Statement"



Statement Merge

Statement Type: Select report file

Email Template: Select email template

SMS Template: Select SMS template

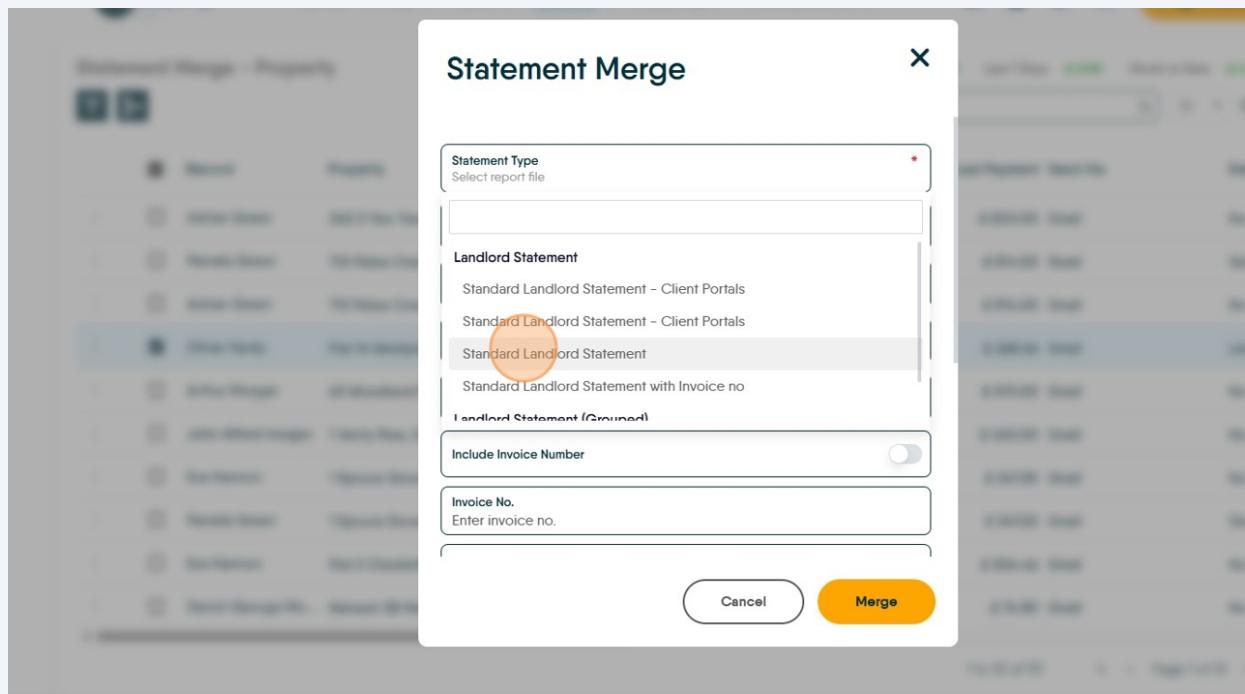
Use Property Statement Period:

Statement Start Date: 26/06/2025 Statement End Date: 25/07/2025

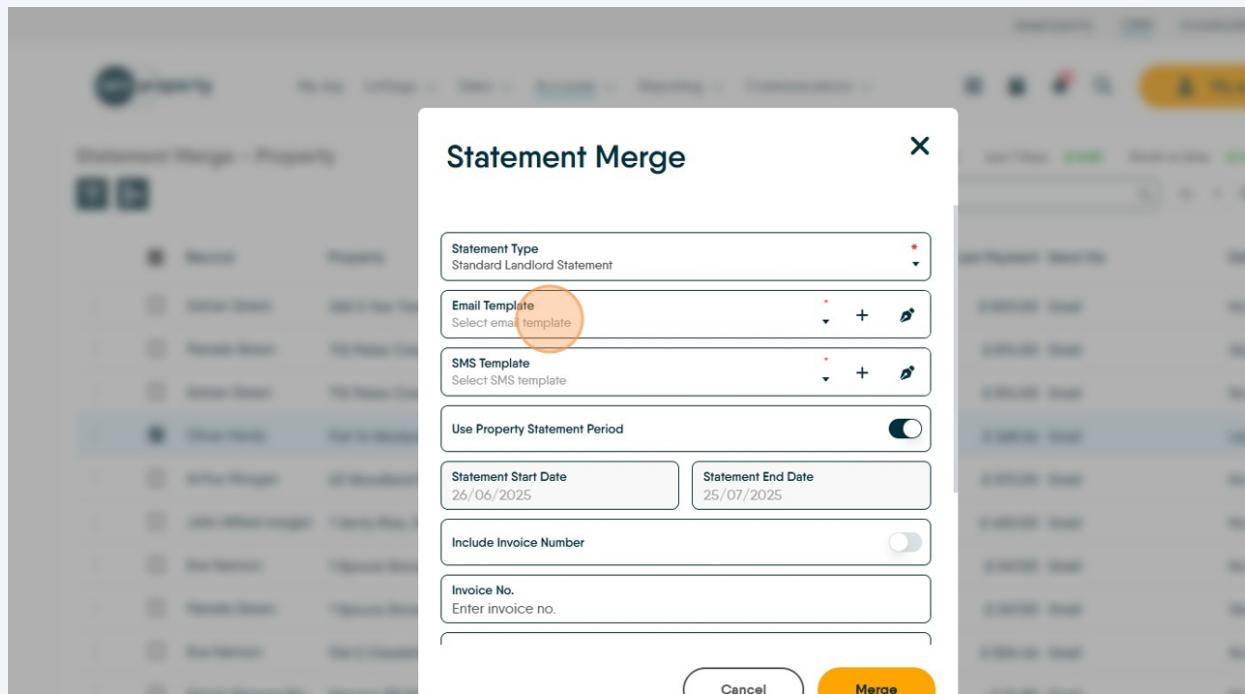
Include Invoice Number:

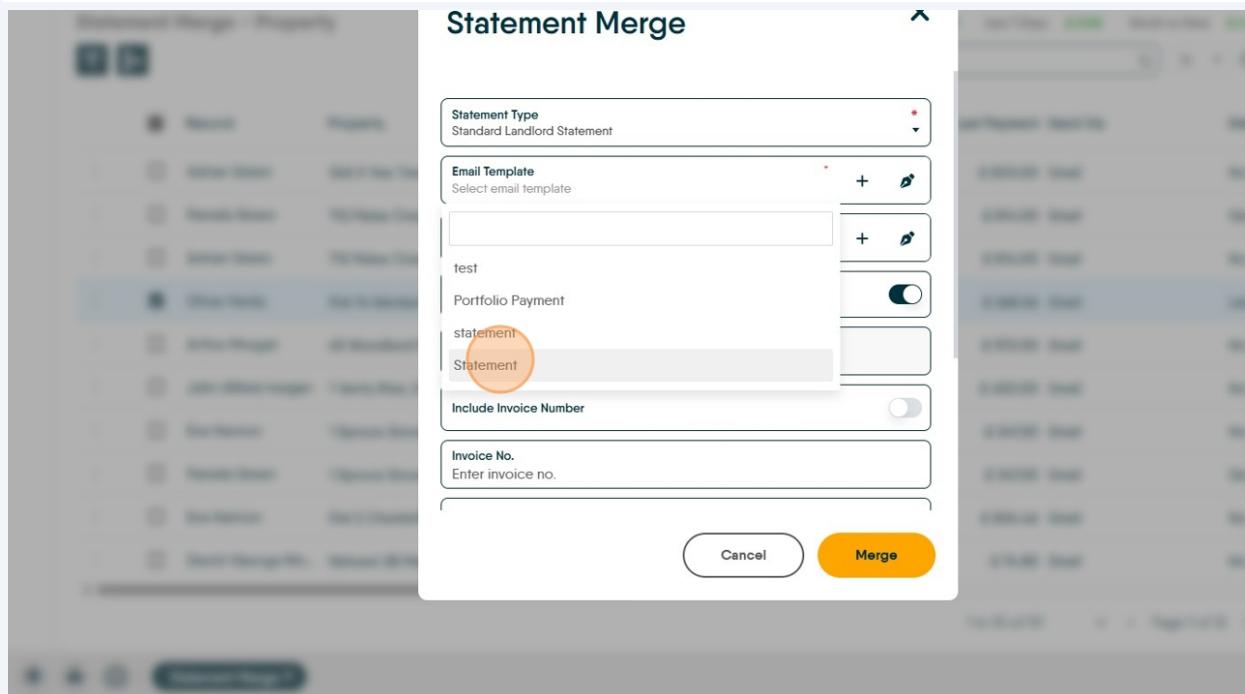
Invoice No.: Enter invoice no.

(Cancel) Merge

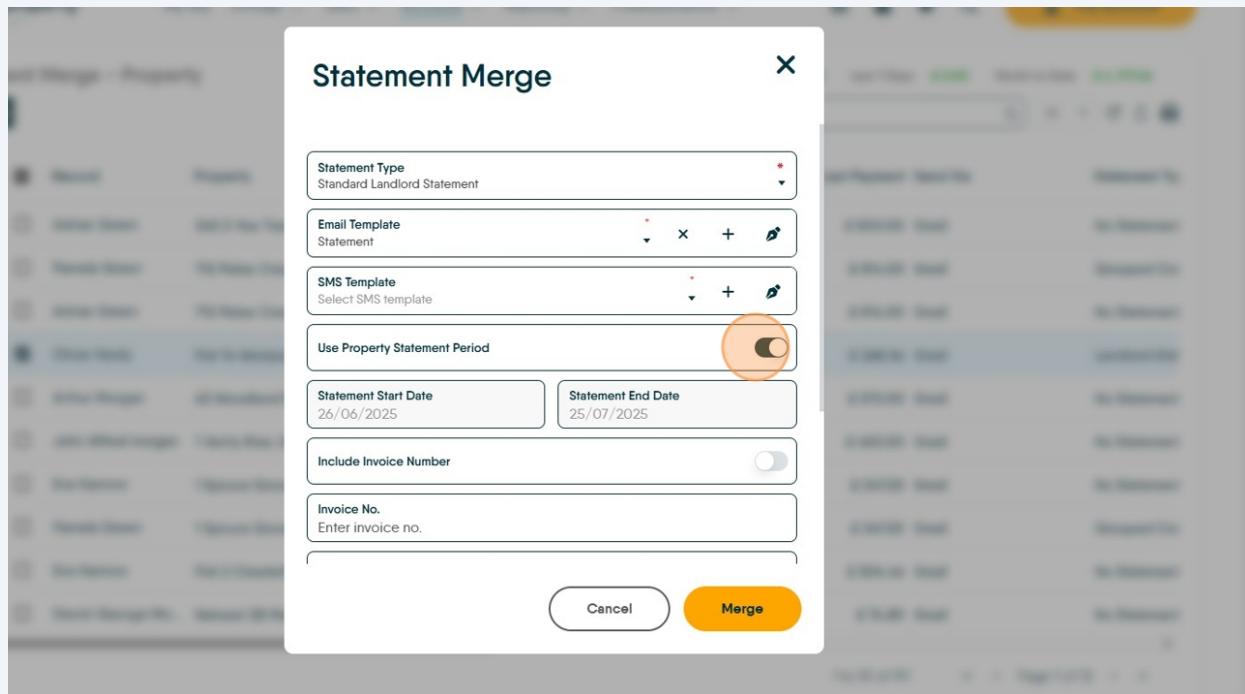


7 Click "Select email template"
Click "Statement"

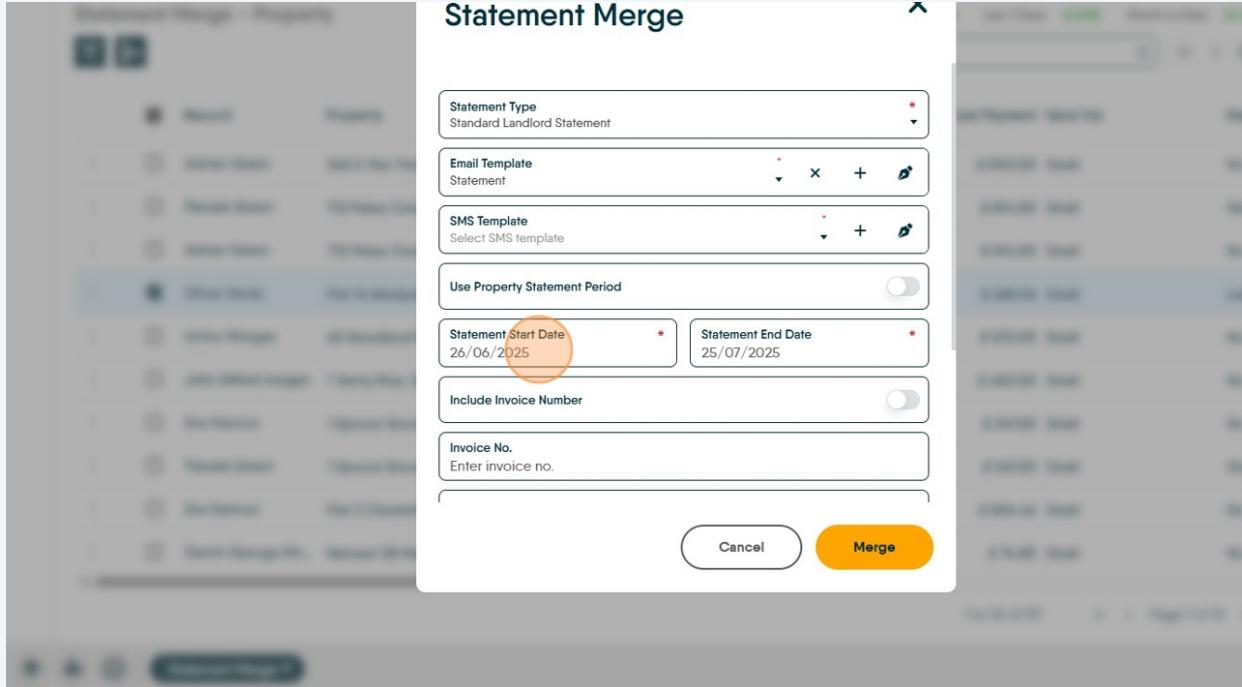




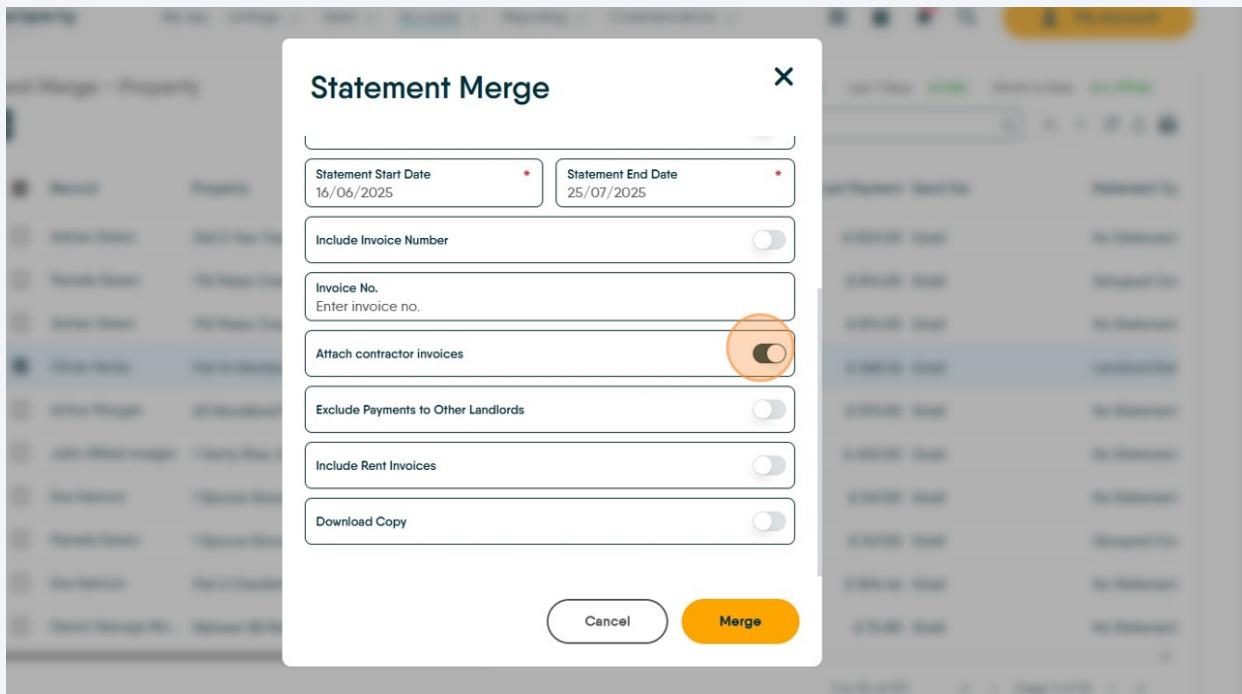
8 Click here. If you need to edit the date of the statement, for example to include a Contractor Invoice switch this option off (it will show greyed out)



9 Click the "Statement Start Date" field and set this to the date required e.g. the date the last Contractor Invoice was uploaded. Usually you would leave the end date as the date you are creating the Statement to maintain the statement periods.



10 If this option is not selected, click here. This can be opted in via Accounts Configuration menu.



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Click "Merge" this will create and send out your statement to the selected Landlords.

