

# 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.



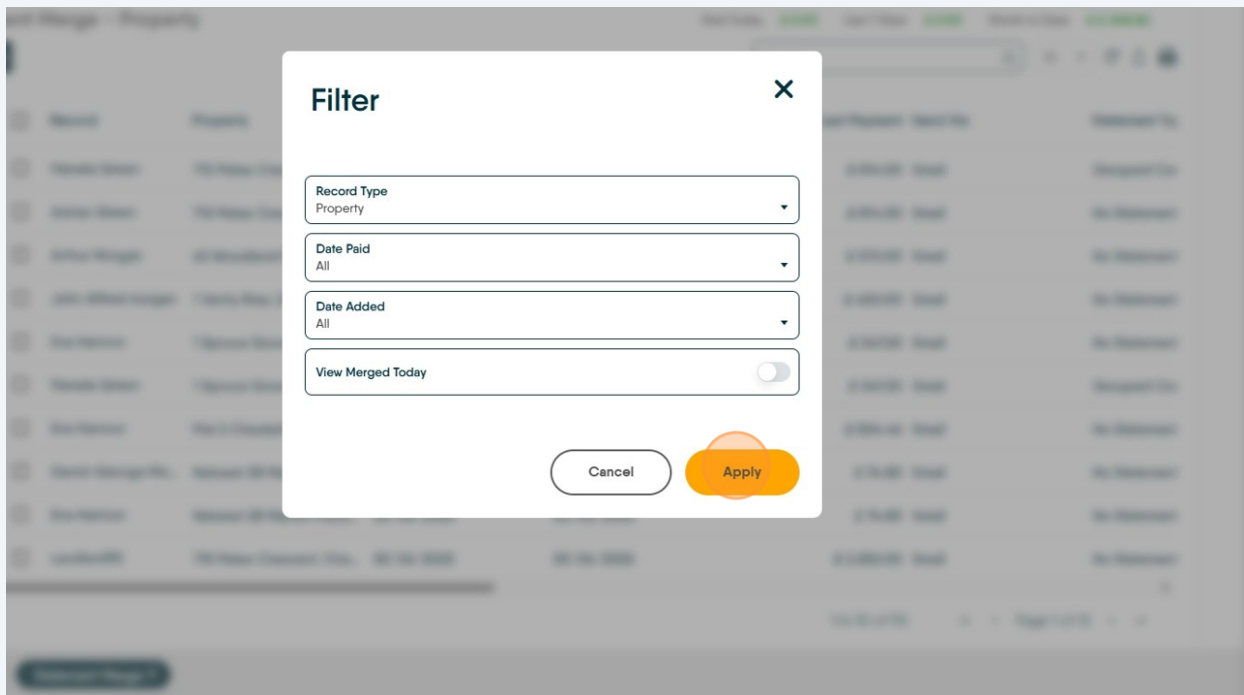
This guide concentrates on making sure Contractor Invoices are added to a Statement Merge, when the Invoice was added in the last statement prior ( i.e. before the Statement Merge start date) and charged in this statement period

1

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

Statement Merge - Property						
Paid Today £ 0.00 Last 7 Days £ 0.00 Month to Date £ 4,9						
<input type="checkbox"/>	Record	Property	Last Payment Date	Date Added	Last Payment	Send Via
<input type="checkbox"/>	Adrian Green	345 5 Yew Tree Close, H...	03/07/2025	03/07/2025	£ 800.00	Email
<input type="checkbox"/>	Pamela Green	712 Pelaw Crescent, Che...	03/07/2025	03/07/2025	£ 814.00	Email
<input type="checkbox"/>	Adrian Green	712 Pelaw Crescent, Che...	03/07/2025	03/07/2025	£ 814.00	Email
<input type="checkbox"/>	Oliver Hardy	Flat 14 Westpoint, Northu...	03/07/2025	03/07/2025	£ 268.56	Email
<input type="checkbox"/>	Arthur Morgan	63 Woodland Road, Darli...	03/07/2025	03/07/2025	£ 572.00	Email
<input type="checkbox"/>	John Alfred morgan	1 Verity Rise, Darlington	03/07/2025	03/07/2025	£ 450.00	Email
<input type="checkbox"/>	Eve Harmon	1 Spruce Grove, Darlingt...	03/07/2025	03/07/2025	£ 347.20	Email
<input type="checkbox"/>	Pamela Green	1 Spruce Grove, Darlingt...	03/07/2025	03/07/2025	£ 347.20	Email
<input type="checkbox"/>	Eve Harmon	Flat 2 Chesterfields, Stan...	03/07/2025	03/07/2025	£ 504.46	Email
<input type="checkbox"/>	David-George Mo	Natwest 28 Market Place	30/06/2025	30/06/2025	£ 74.80	Email

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



The image shows a 'Filter' dialog box overlaid on a blurred background of a data table. The dialog box has a title bar with 'Filter' and a close button (X). It contains four filter criteria, each with a dropdown menu and a toggle switch:

- Record Type:** Property
- Date Paid:** All
- Date Added:** All
- View Merged Today:** (toggle switch is off)

At the bottom of the dialog box are two buttons: 'Cancel' and 'Apply'.



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.

iam property

My day Lettings Sales Accounts Reporting Communications

Statement Merge - Property

Paid Today £ 0.00 Last 7 Days £ 0.00 Month to Date £ 3,848.86

Search 10

Mobile	Address	Statement Start	Statement End	Current Balance	Statement No.	Last Statement Merge
0712324567898	37 Barrett Road, Darlingt...	26/06/2025	25/07/2025	£ 0.00	33	25/06/2025
07863525455	1111 Kingsway, Darlington	26/06/2025	25/07/2025	£ 0.00	33	25/06/2025
07788996666	41 Barrett Road, Darlingt...	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
0789564215	3 St Claires Close, Keswi...	10/06/2025	25/07/2025	£ 0.00	39	09/06/2025
0712324567898	37 Barrett Road, Darlingt...	10/06/2025	25/07/2025	£ 0.00	39	09/06/2025
0789564215	3 St Claires Close, Keswi...	10/06/2025	25/07/2025	£ 0.00	32	09/06/2025
07845 325698	35 Yew Tree Close, Hurw...	02/05/2024	25/07/2025	£ 0.00	3	01/05/2024
0789564215	3 St Claires Close, Keswi...	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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4

Select the Landlord you are sending the statement to.

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My day Lettings Sales Accounts Reporting Communications

Statement Merge - Property

Paid Today £ 0.00 Last 7 Days £ 0.00 Month to Date £ 4,9

Search 10

<input type="checkbox"/>	Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	Sta
<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	Gr
<input type="checkbox"/>	Adrian Green	712 Pelaw Crescent, Che...	03/07/2025	03/07/2025	£ 814.00	Email	No
<input type="checkbox"/>	Oliver Hardy	Flat 14 Westpoint, Northu...	03/07/2025	03/07/2025	£ 268.56	Email	Lar
<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	Gr
<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...	Natwest 28 Market Place...	30/06/2025	30/06/2025	£ 74.80	Email	No

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5 Click here.

The screenshot shows the 'iamproperty' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main header shows 'Paid Today £ 0.00', 'Last 7 Days £ 0.00', and 'Month to Date £ 4,9'. The 'Statement Merge - Property' screen displays a table with columns: Record, Property, Last Payment Date, Date Added, Last Payment, Send Via, and Status. A red circle highlights the 'Merge' button in the top left corner of the table.

Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	Status	
<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	Gr
<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	Lai
<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	Gr
<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	Natwest 28 Market Place	30/06/2025	30/06/2025	£ 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"

The screenshot shows the 'Statement Merge' modal form. The form includes fields for 'Statement Type' (with a red circle highlighting the dropdown), 'Email Template', 'SMS Template', 'Use Property Statement Period' (toggle), 'Statement Start Date' (26/06/2025), 'Statement End Date' (25/07/2025), 'Include Invoice Number' (toggle), and 'Invoice No.' (text input). The 'Merge' button is highlighted in orange.

Statement Merge

Statement Type  
Select report file

Email Template  
Select email template

SMS Template  
Select SMS template

Use Property Statement Period

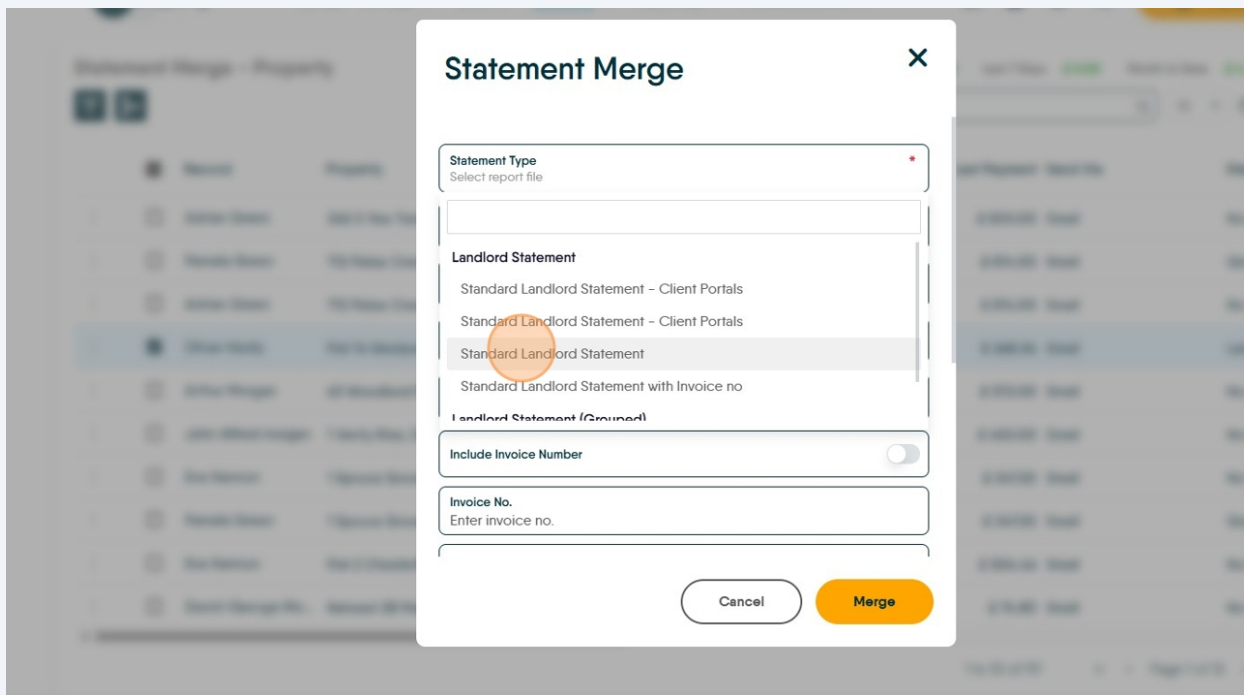
Statement Start Date  
26/06/2025

Statement End Date  
25/07/2025

Include Invoice Number

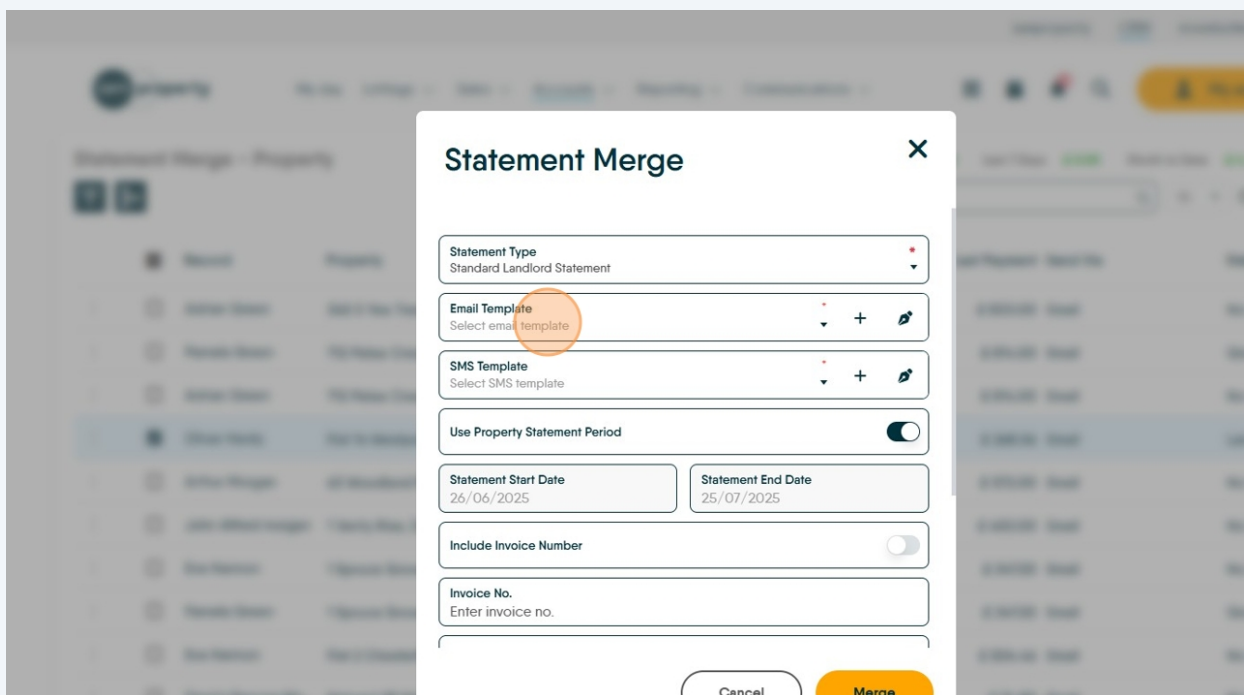
Invoice No.  
Enter invoice no.

Cancel Merge



7

Click "Select email template"  
Click "Statement"



### Statement Merge

Statement Type  
Standard Landlord Statement

Email Template  
Select email template

- test
- Portfolio Payment
- statement
- Statement**

Include Invoice Number

Invoice No.  
Enter invoice no.

Cancel Merge

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)

### Statement Merge

Statement Type  
Standard Landlord Statement

Email Template  
Statement

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



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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.

**Statement Merge**

Statement Type  
Standard Landlord Statement

Email Template  
Statement

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

10

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

**Statement Merge**

Statement Start Date  
16/06/2025

Statement End Date  
25/07/2025

Include Invoice Number ☐

Invoice No.  
Enter invoice no.

Attach contractor invoices ☒

Exclude Payments to Other Landlords ☐

Include Rent Invoices ☐

Download Copy ☐

Cancel Merge

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

The screenshot shows a 'Statement Merge' dialog box overlaid on a blurred background of a software interface. The dialog box has a title bar with the text 'Statement Merge' and a close button. It contains several input fields and toggle switches. The 'Statement Start Date' is set to '16/06/2025' and the 'Statement End Date' is set to '25/07/2025'. There are two toggle switches: 'Include Invoice Number' and 'Include Rent Invoices', both of which are currently turned off. There is also a toggle switch for 'Attach contractor invoices' which is turned on. Below these are two text input fields: 'Invoice No.' with the placeholder text 'Enter invoice no.' and 'Download Copy'. At the bottom of the dialog box are two buttons: 'Cancel' and 'Merge'. The 'Merge' button is highlighted with an orange circle.

**Statement Merge**

Statement Start Date: 16/06/2025

Statement End Date: 25/07/2025

Include Invoice Number: ☐

Invoice No.: Enter invoice no.

Attach contractor invoices: ☒

Exclude Payments to Other Landlords: ☐

Include Rent Invoices: ☐

Download Copy: ☐

Cancel Merge