

Generating a Contractor Statement in CRM



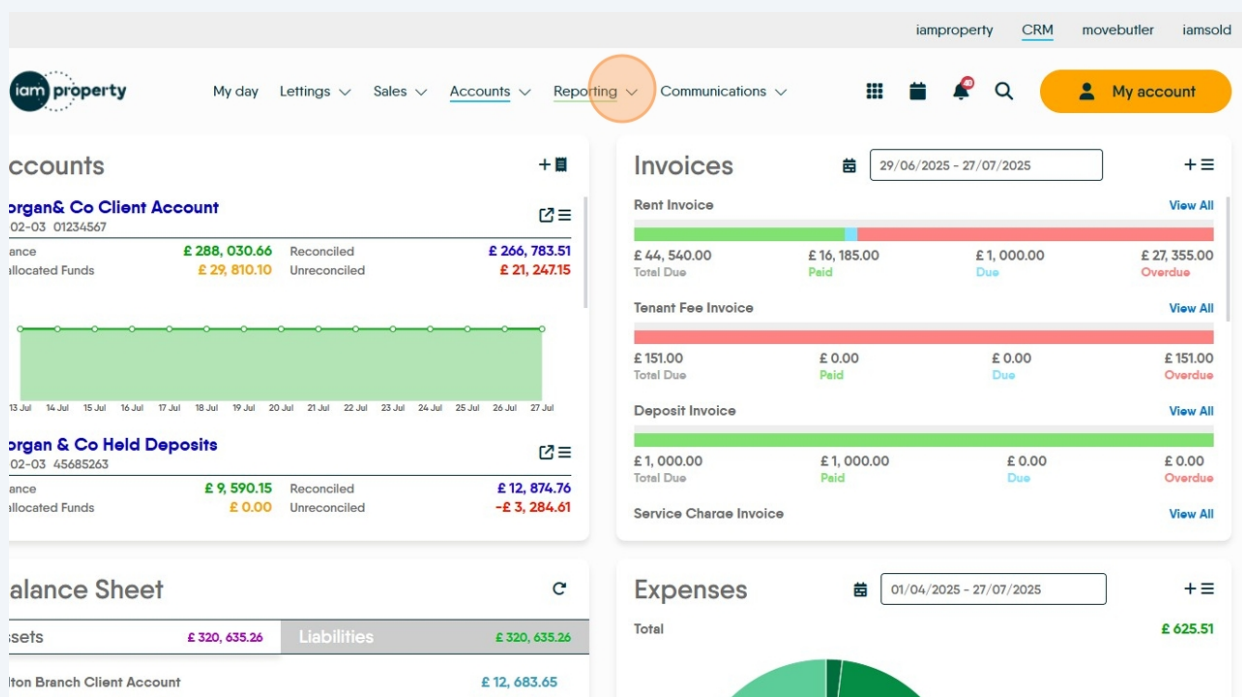
This guide provides a straightforward approach to generating a Contractor Statement using the Reports feature of the CRM.

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.



A Statement Merge can also be created for a Contractor to send statements to ALL Contractors at the same time, this process creates a statement for one particular Contractor.

1 Click "Reporting"



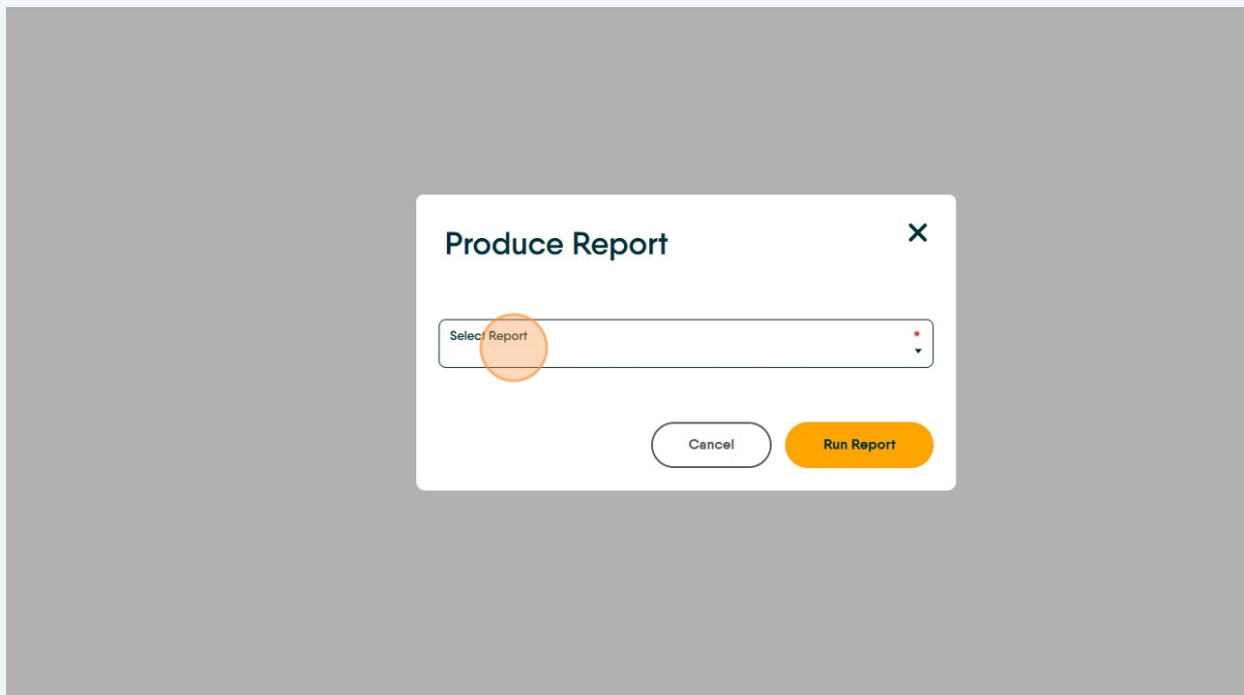
2 Click "Reports"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes the logo, 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Reporting' menu is highlighted with an orange circle. Below the navigation bar, the 'Reporting Dashboard' is visible, showing various financial reports and charts. The 'Reports' menu is highlighted with an orange circle.

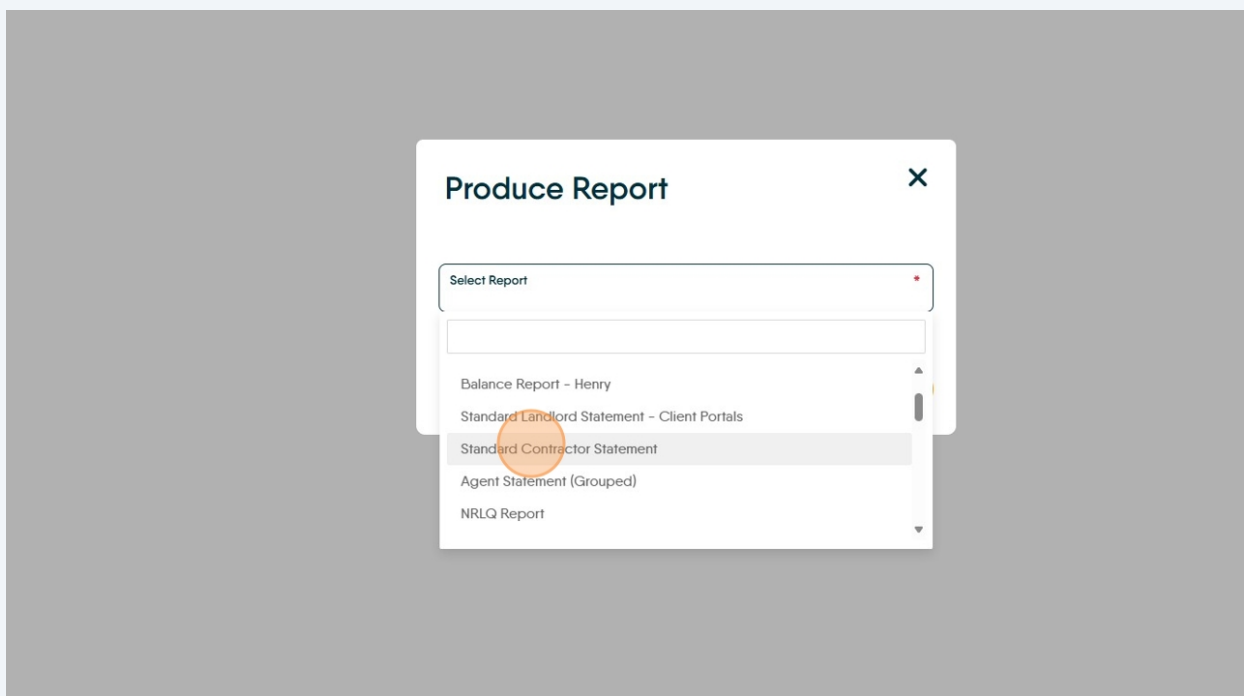
3 Click "Accounts"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes the logo, 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Accounts' menu is highlighted with an orange circle. Below the navigation bar, the 'Reports' section is visible, showing various financial reports and charts. The 'Accounts' menu is highlighted with an orange circle.

- 4 Click here, search for and select the report to run.

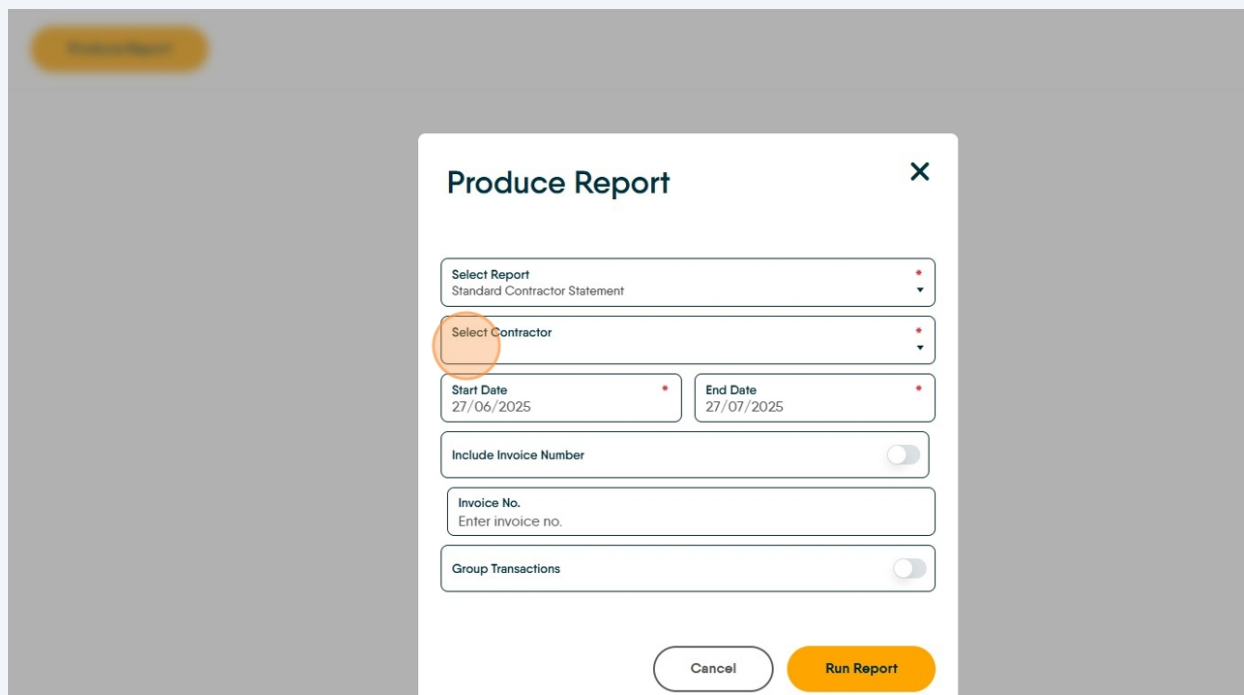


- 5 In this case, click "Standard Contractor Statement"



6

Click here to select the contractor you are creating the report for. Search and select from the drop down menu.

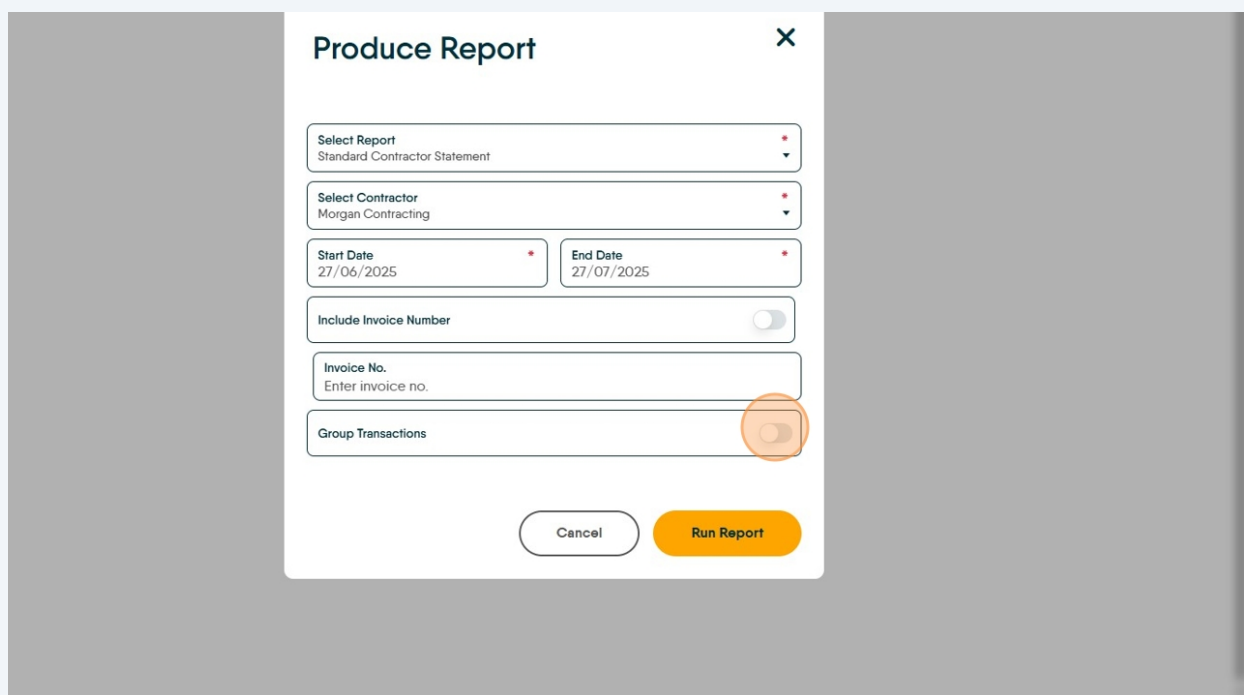


The screenshot shows a 'Produce Report' dialog box with the following fields and controls:

- Select Report:** A dropdown menu with 'Standard Contractor Statement' selected.
- Select Contractor:** A dropdown menu, highlighted with an orange circle.
- Start Date:** A date field with '27/06/2025' and a red asterisk.
- End Date:** A date field with '27/07/2025' and a red asterisk.
- Include Invoice Number:** A toggle switch, currently turned off.
- Invoice No.:** A text input field with the placeholder 'Enter invoice no.'
- Group Transactions:** A toggle switch, currently turned off.
- Buttons:** 'Cancel' and 'Run Report' (orange) at the bottom right.

7

If you want to group similar transactions, click here.



The screenshot shows the same 'Produce Report' dialog box, but with the 'Group Transactions' toggle switch highlighted by an orange circle. The 'Select Contractor' field now displays 'Morgan Contracting'.

- Select Report:** A dropdown menu with 'Standard Contractor Statement' selected.
- Select Contractor:** A dropdown menu with 'Morgan Contracting' selected.
- Start Date:** A date field with '27/06/2025' and a red asterisk.
- End Date:** A date field with '27/07/2025' and a red asterisk.
- Include Invoice Number:** A toggle switch, currently turned off.
- Invoice No.:** A text input field with the placeholder 'Enter invoice no.'
- Group Transactions:** A toggle switch, highlighted with an orange circle.
- Buttons:** 'Cancel' and 'Run Report' (orange) at the bottom right.

8

Click "Run Report"

Produce Report

Select Report
Standard Contractor Statement

Select Contractor
Morgan Contracting

Start Date
27/06/2025

End Date
27/07/2025

Include Invoice Number

Invoice No.
Enter invoice no.

Group Transactions

Cancel

Run Report

9

The report will show on the screen, you now print the report or export it. To print [click here](#).

Produce Report

Contractor Statement

27/07/2025

Morgan Contracting

16 Yew Tree Close

Hurworth

Darlington

Durham

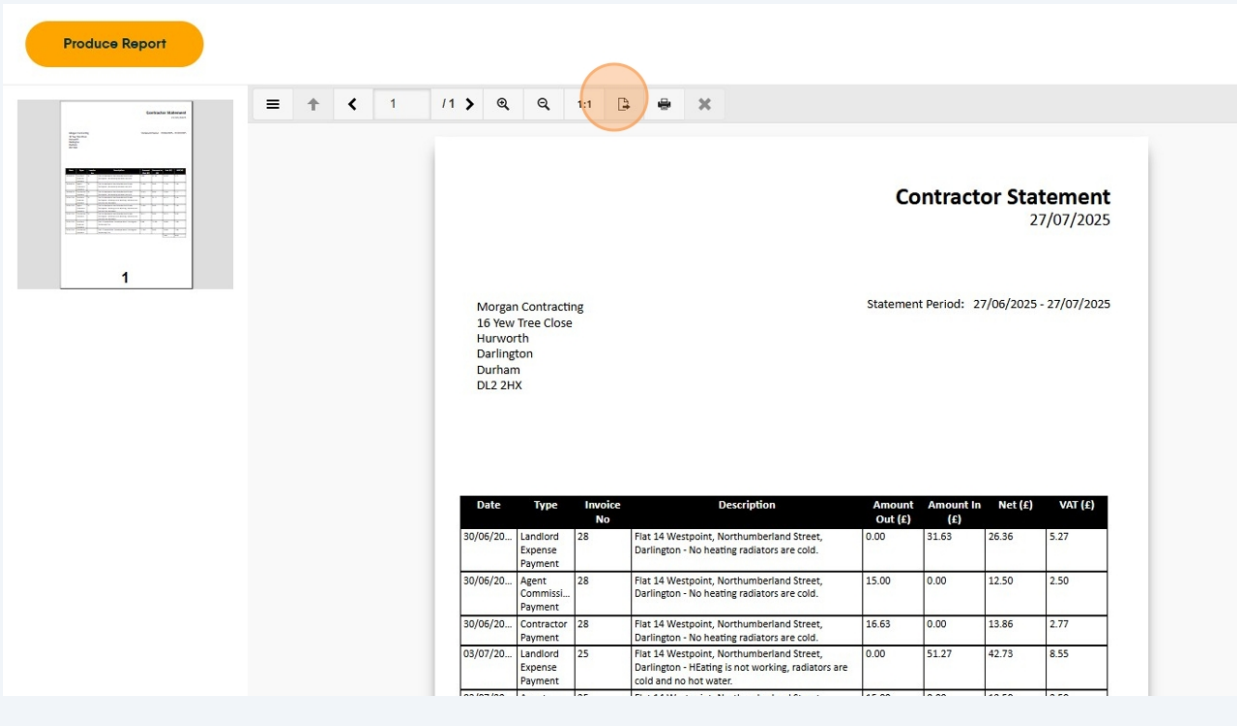
DL2 2HX

Statement Period: 27/06/2025 - 27/07/2025

Date	Type	Invoice No	Description	Amount Out (£)	Amount In (£)	Net (£)	VAI (£)
30/06/20...	Landlord Expense Payment	28	Flat 14 Westpoint, Northumberland Street, Darlington - No heating radiators are cold.	0.00	31.63	26.36	5.27
30/06/20...	Agent Commissi... Payment	28	Flat 14 Westpoint, Northumberland Street, Darlington - No heating radiators are cold.	15.00	0.00	12.50	2.50
30/06/20...	Contractor Payment	28	Flat 14 Westpoint, Northumberland Street, Darlington - No heating radiators are cold.	16.63	0.00	13.86	2.77
03/07/20...	Landlord Expense Payment	25	Flat 14 Westpoint, Northumberland Street, Darlington - HEating is not working, radiators are cold and no hot water.	0.00	51.27	42.73	8.55
03/07/20...	Contractor Payment	25	Flat 14 Westpoint, Northumberland Street, Darlington - HEating is not working, radiators are cold and no hot water.	45.00	0.00	45.00	2.00

- 10 To export the report to a different file format e.g. PDF or Excel. Click "Export"

Produce Report



Contractor Statement
27/07/2025

Morgan Contracting
16 Yew Tree Close
Hurworth
Darlington
Durham
DL2 2HX

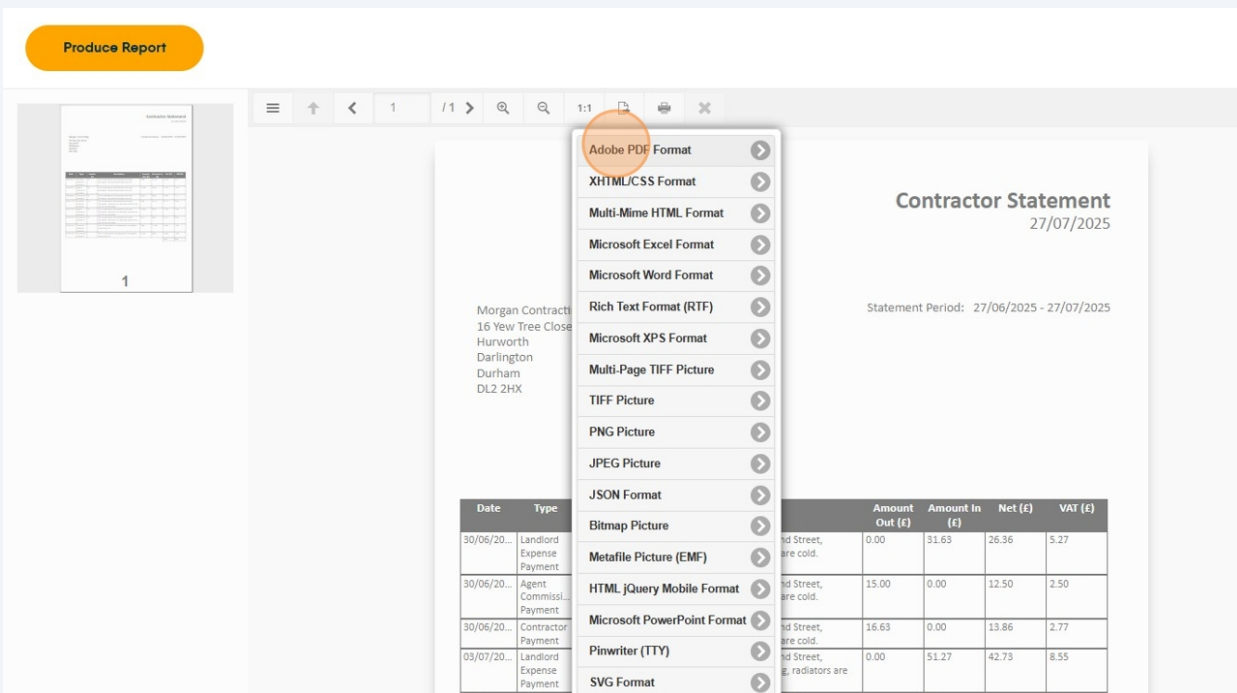
Statement Period: 27/06/2025 - 27/07/2025

Date	Type	Invoice No	Description	Amount Out (£)	Amount In (£)	Net (£)	VAT (£)
30/06/20...	Landlord Expense Payment	28	Flat 14 Westpoint, Northumberland Street, Darlington - No heating radiators are cold.	0.00	31.63	26.36	5.27
30/06/20...	Agent Commission Payment	28	Flat 14 Westpoint, Northumberland Street, Darlington - No heating radiators are cold.	15.00	0.00	12.50	2.50
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03/07/20...	Landlord Expense Payment	25	Flat 14 Westpoint, Northumberland Street, Darlington - Heating is not working, radiators are cold and no hot water.	0.00	51.27	42.73	8.55

- 11 For example. Click "Adobe PDF Format" and the file will be exported to PDF and saved in your Downloads folder.

You could export the file to any of the file formats shown in the list, our example shows PDF as this would be the usual type used.

Produce Report



Contractor Statement
27/07/2025

Morgan Contracting
16 Yew Tree Close
Hurworth
Darlington
Durham
DL2 2HX

Statement Period: 27/06/2025 - 27/07/2025

Date	Type	Invoice No	Description	Amount Out (£)	Amount In (£)	Net (£)	VAT (£)
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- Adobe PDF Format
- XHTML/CSS Format
- Multi-Mime HTML Format
- Microsoft Excel Format
- Microsoft Word Format
- Rich Text Format (RTF)
- Microsoft XPS Format
- Multi-Page TIFF Picture
- TIFF Picture
- PNG Picture
- JPEG Picture
- JSON Format
- Bitmap Picture
- Metafile Picture (EMF)
- HTML jQuery Mobile Format
- Microsoft PowerPoint Format
- Pinwriter (TTY)
- SVG Format

12

Click here to complete creating your Contractor Statement.

port

Contractor Statement
27/07/2025

Morgan Contracting
16 Yew Tree Close
Hurworth
Darlington
Durham
DL2 2HX

Statement Period: 27/06/2025 - 27/07/2025

Date	Type	Invoice No	Description	Amount Out (£)	Amount In (£)	Net (£)	VAT (£)
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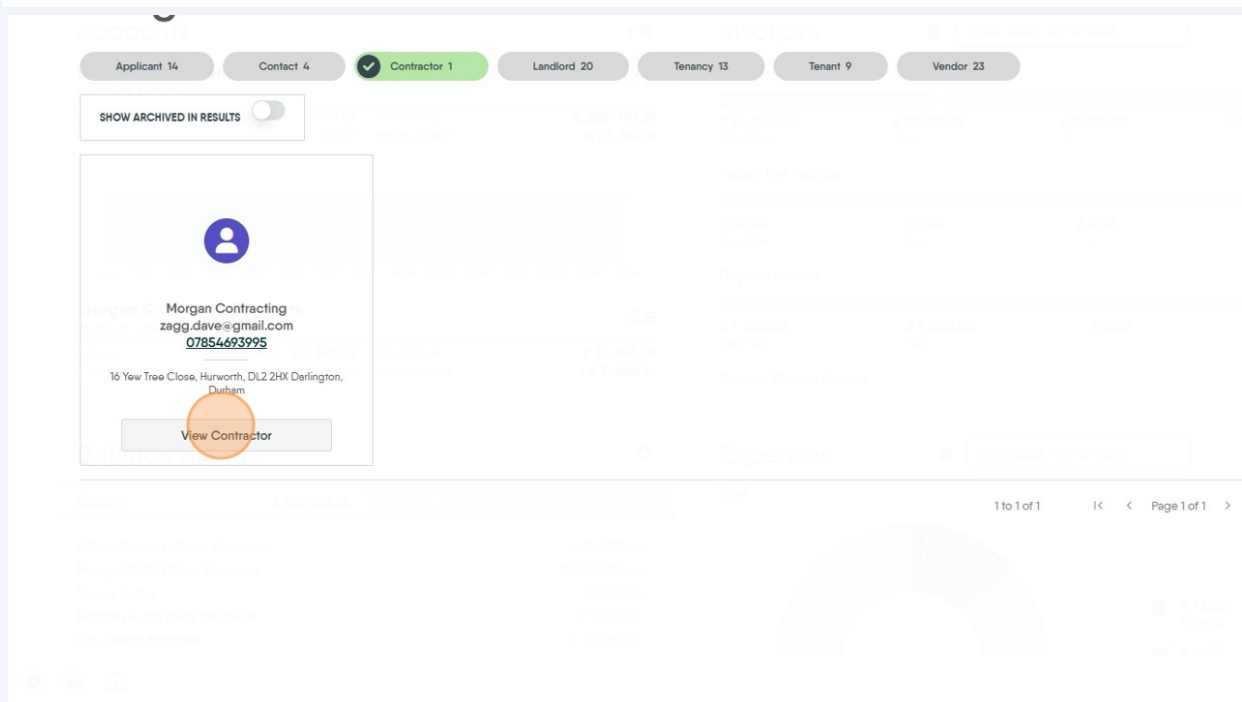
Sending the Statement to your Contractor via CRM.

13 Click "Search"

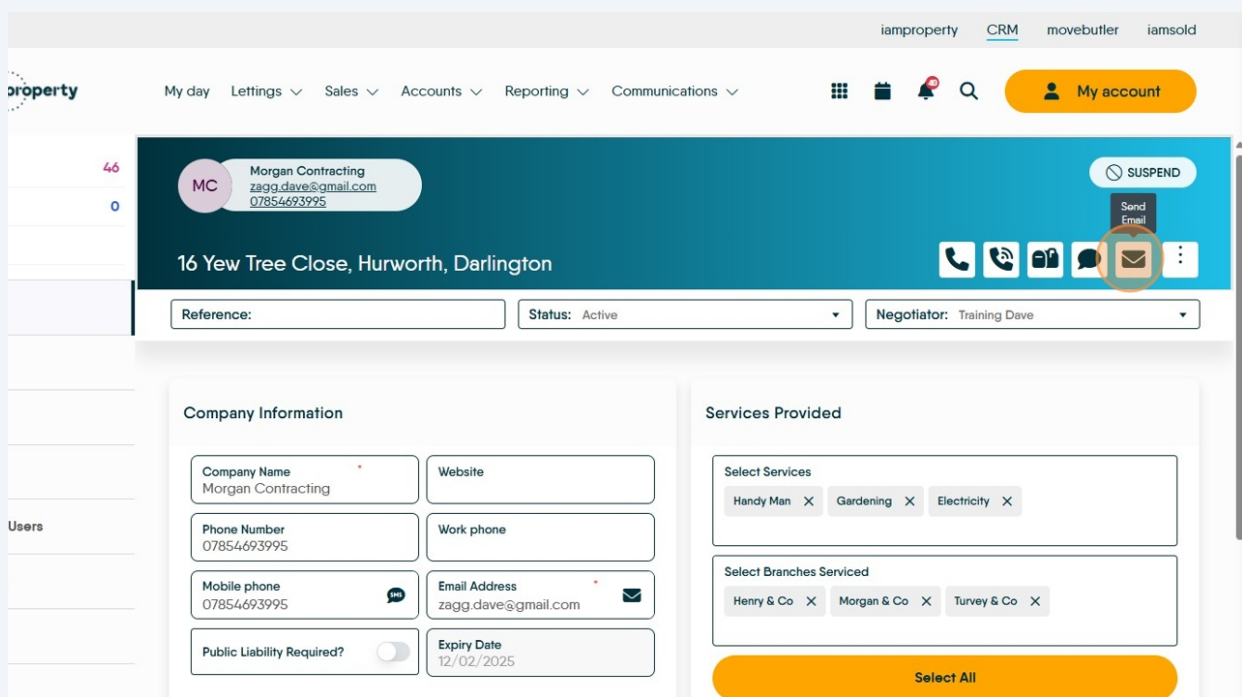
The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search icon (magnifying glass) is highlighted with an orange circle. Below the navigation bar, the dashboard is divided into several sections: 'Units' (showing 'Co Client Account' and 'Co Held Deposits'), 'Invoices' (showing 'Rent Invoice', 'Tenant Fee Invoice', 'Deposit Invoice', and 'Service Charge Invoice'), and 'Expenses' (showing a 'Total' of £ 625.51). The search icon is located in the top right corner of the dashboard.

14 Type your contractor name and search, then select it. To make it easy to find the Contractor record, click the 'Contractor' tab. Click "View Contractor"

The screenshot shows the iamproperty CRM dashboard with the 'Contractor' tab selected. The search bar at the top contains the text 'morgan'. Below the search bar, there are tabs for 'Applicant 14', 'Contact 4', 'Contractor 1', 'Landlord 20', 'Tenancy 13', 'Tenant 9', and 'Vendor 23'. The 'Contractor 1' tab is highlighted with an orange circle. Below the tabs, there is a 'SHOW ARCHIVED IN RESULTS' toggle switch. The search results are displayed in a grid of four cards, each showing a profile picture, name, email, phone number, and address. The first card is for 'Mr David Morgan' (david.morgan8@iamproperty.com, 07711123456). The second card is for 'Leonard Morgan' (free@morgan.co, 0752658554). The third card is for 'Mr David Morgan' (david.morgan9@iamproperty.com, 07711123456). The fourth card is for 'Mr david Morgan' (david.morgan7@iamproperty.com, 07711123456). Each card has a 'View Landlord' or 'View Vendor' button.

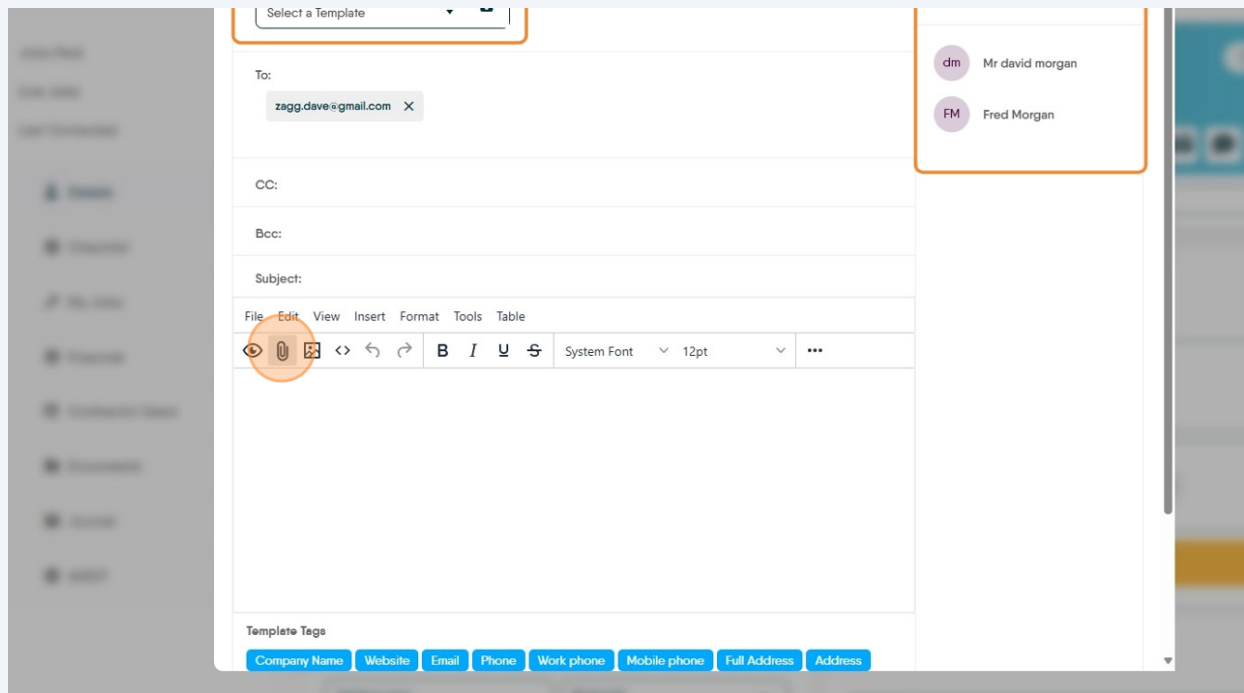


15 To email the statement, click here.



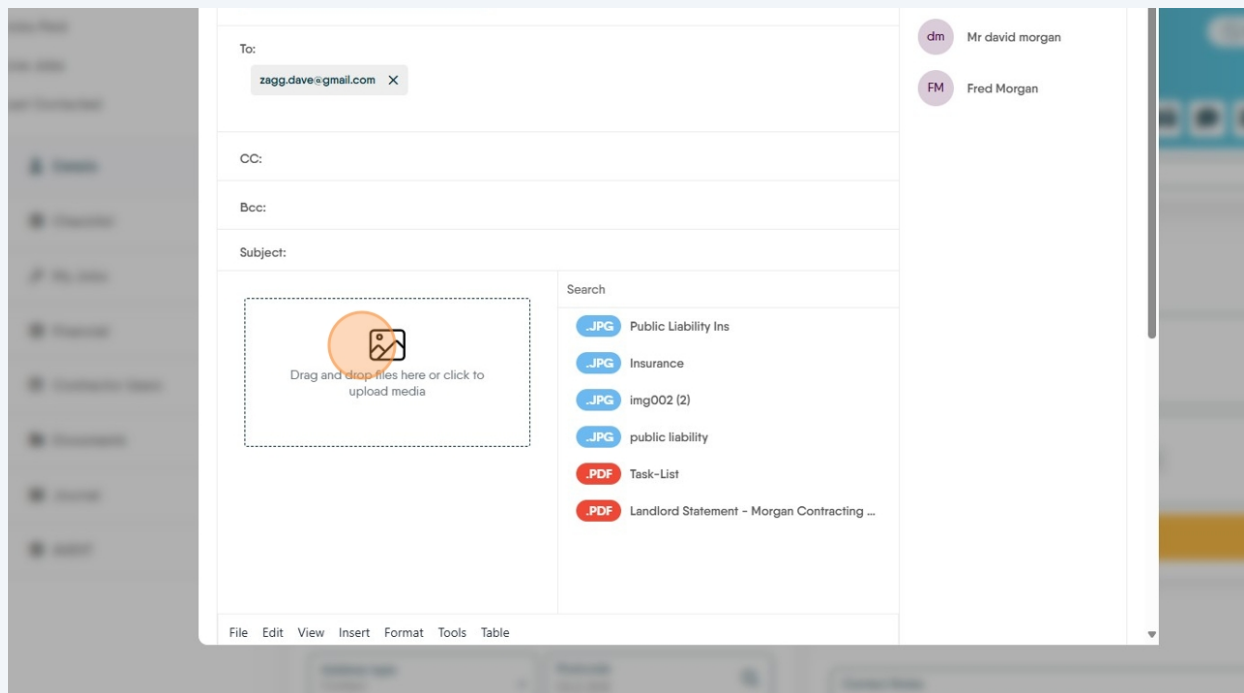
16

On this screen click here to attach a file. You can also select additional recipients from the right side of the screen and select a message template if you have one created.



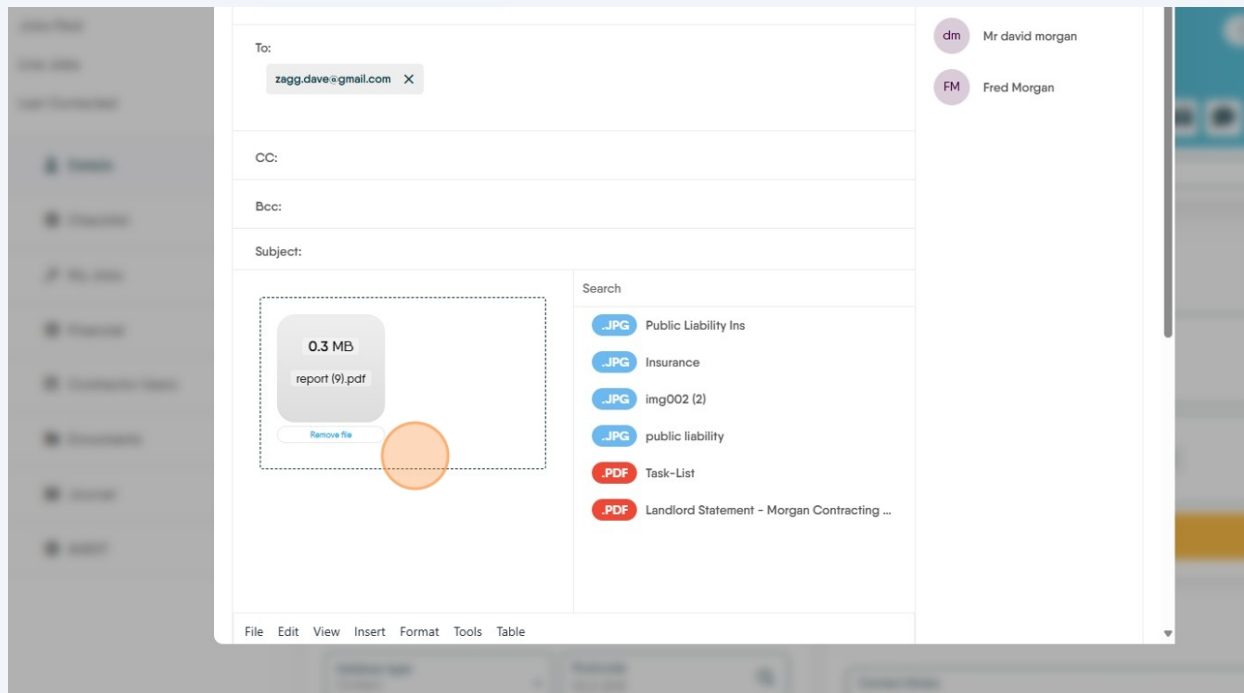
17

Click "Drag and drop files here or click to upload media" to search for the report, if not moved prior the file will show in the 'Downloads' folder of your PC. You will also see any files uploaded to the Contractor record.



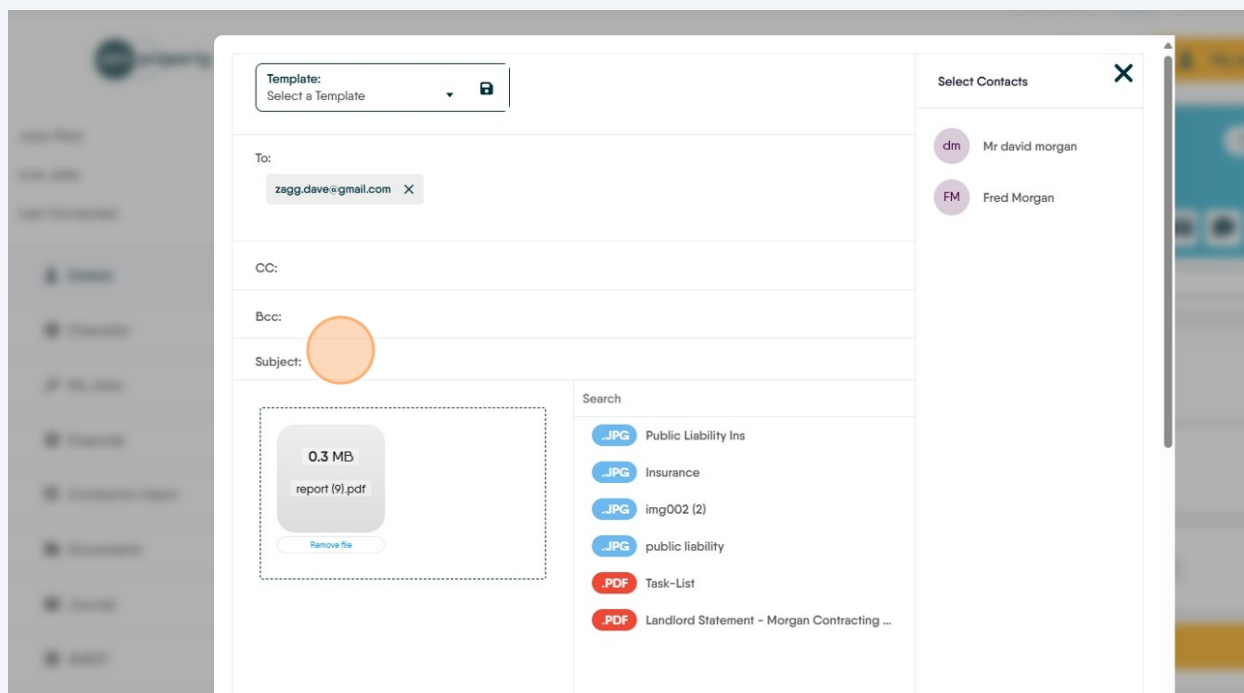
18

Once selected the file detail will show in the box, you can repeat this to add further files.



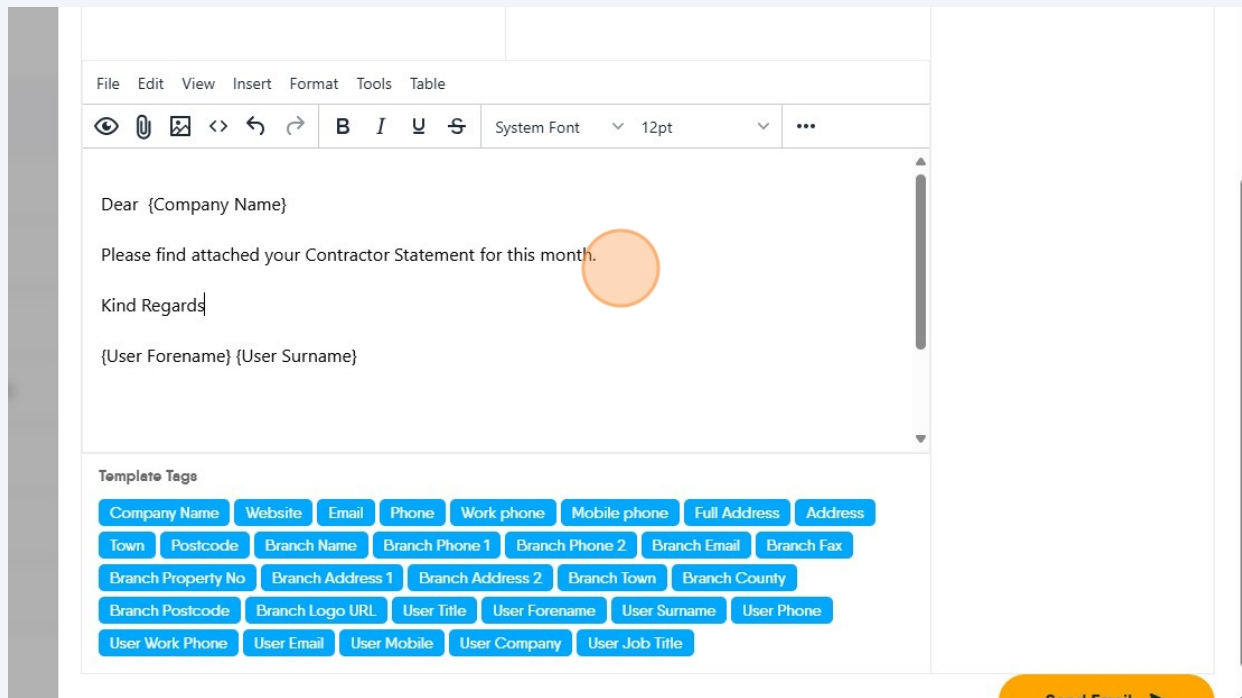
19

Click the "Subject:" field and add the email subject.



20

If you have selected a previously created message template it will show here, otherwise type your message.



File Edit View Insert Format Tools Table

System Font 12pt

Dear {Company Name}

Please find attached your Contractor Statement for this month.

Kind Regards

{User Forename} {User Surname}

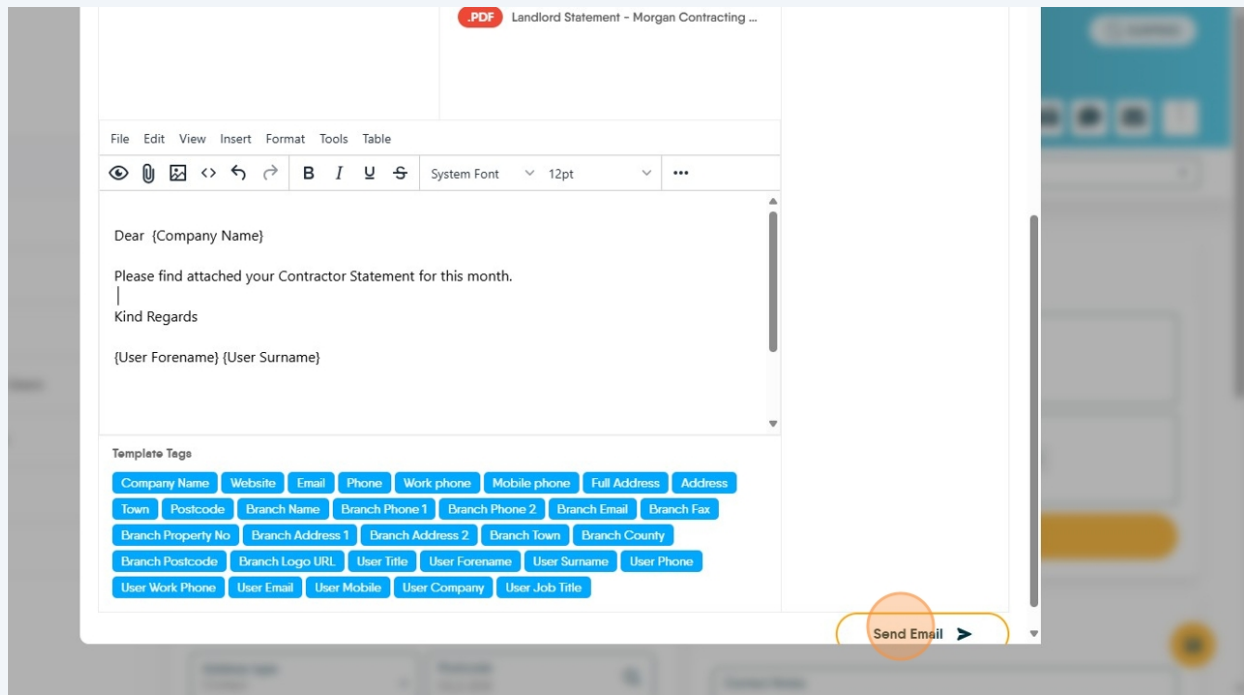
Template Tags

Company Name	Website	Email	Phone	Work phone	Mobile phone	Full Address	Address
Town	Postcode	Branch Name	Branch Phone 1	Branch Phone 2	Branch Email	Branch Fax	
Branch Property No	Branch Address 1	Branch Address 2	Branch Town	Branch County			
Branch Postcode	Branch Logo URL	User Title	User Forename	User Surname	User Phone		
User Work Phone	User Email	User Mobile	User Company	User Job Title			

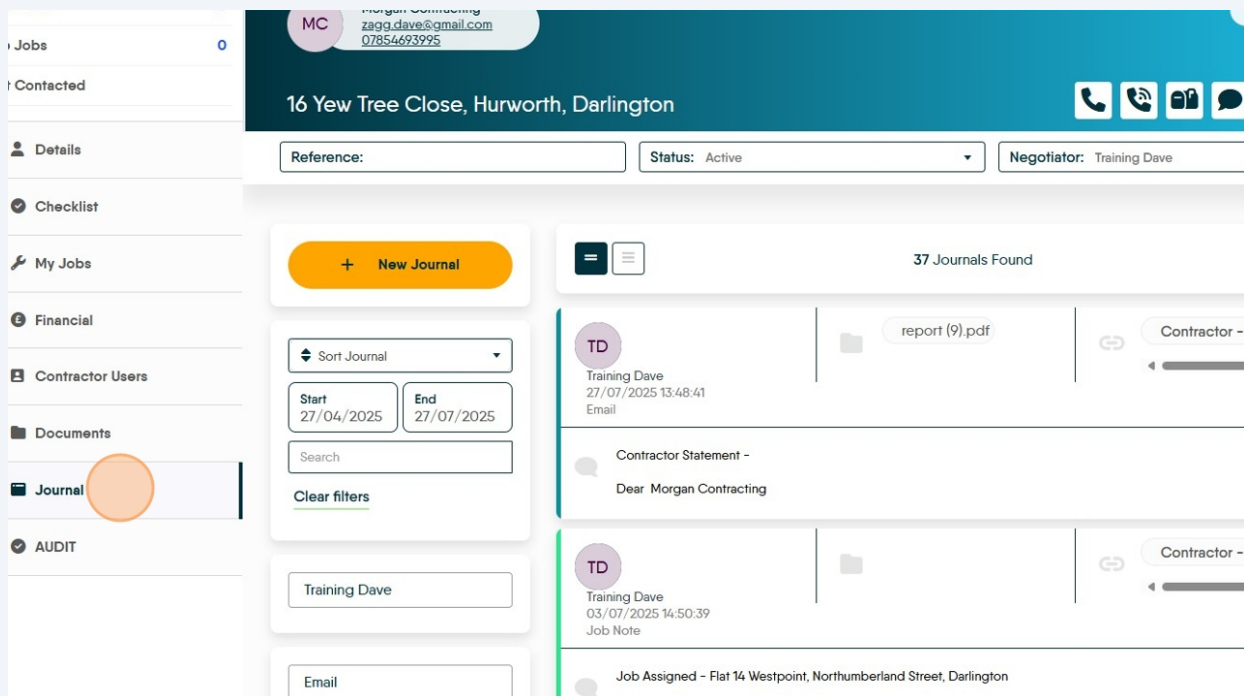


Tip! The Template Tags will automatically show the information shown on the tag e.g. Company Name will show the Contractor Company Name, User Forename will show the forename of the branch user sending the message.

21 Once complete click "Send Email"



22 The message sent will show in the Journal. Click "Journal" to view



23 Click the report detail, in the middle field.

The screenshot shows a software interface for managing journals. At the top, there's a header for 'Morgan Contracting' with contact details and a 'SUSPEND' button. Below this, the address '16 Yew Tree Close, Hurworth, Darlington' is displayed. A navigation bar includes a 'Reference' field, a 'Status' dropdown set to 'Active', and a 'Negotiator' dropdown set to 'Training Dave'. On the left, there's a sidebar with a 'Users' section. The main area shows a list of journals. The first journal entry is selected, showing details for 'Training Dave' dated '27/07/2025 13:48:41'. It includes a 'report (9).pdf' attachment and a 'Contractor Statement' section. The second journal entry is dated '03/07/2025 14:50:39' and is a 'Job Note' about a job assigned at 'Flat 14 Westpoint, Northumberland Street, Darlington'.

24 You will then see the report file uploaded. Click ".PDF report (9)" to open the file

The screenshot shows a modal dialog box titled 'Edit journal entry'. It has three tabs: 'DETAILS', 'ATTACHMENTS', and 'RECORDS'. The 'ATTACHMENTS' tab is active, displaying a search bar with the text 'Type anywhere to search attachments'. Below the search bar, there is a list of attachments, including a PDF file named 'report (9)'. To the right of the attachment list, there is a large orange circle and a download icon. At the bottom of the dialog, there are 'Cancel' and 'Save' buttons.