

# 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.



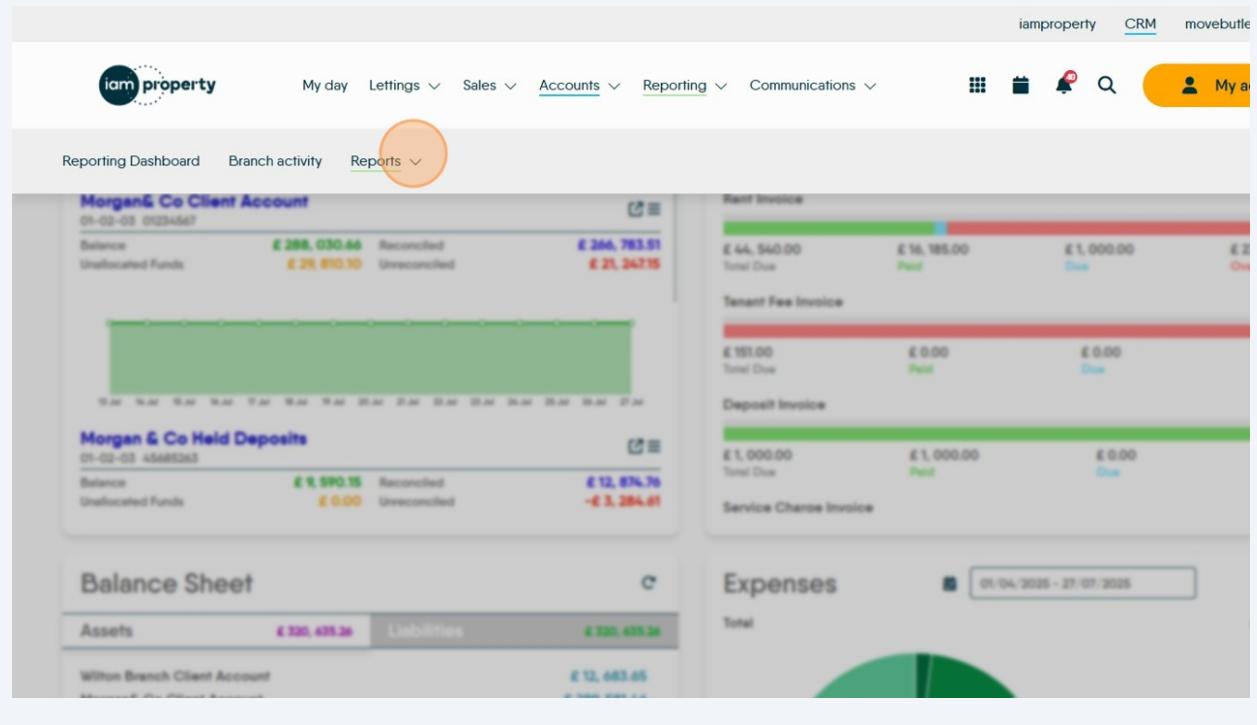
A Statement Merge can also be created for a Contractor to send statements to ALL Contractors at the same time, this process creates a statement for one particular Contractor.

1

Click "Reporting"

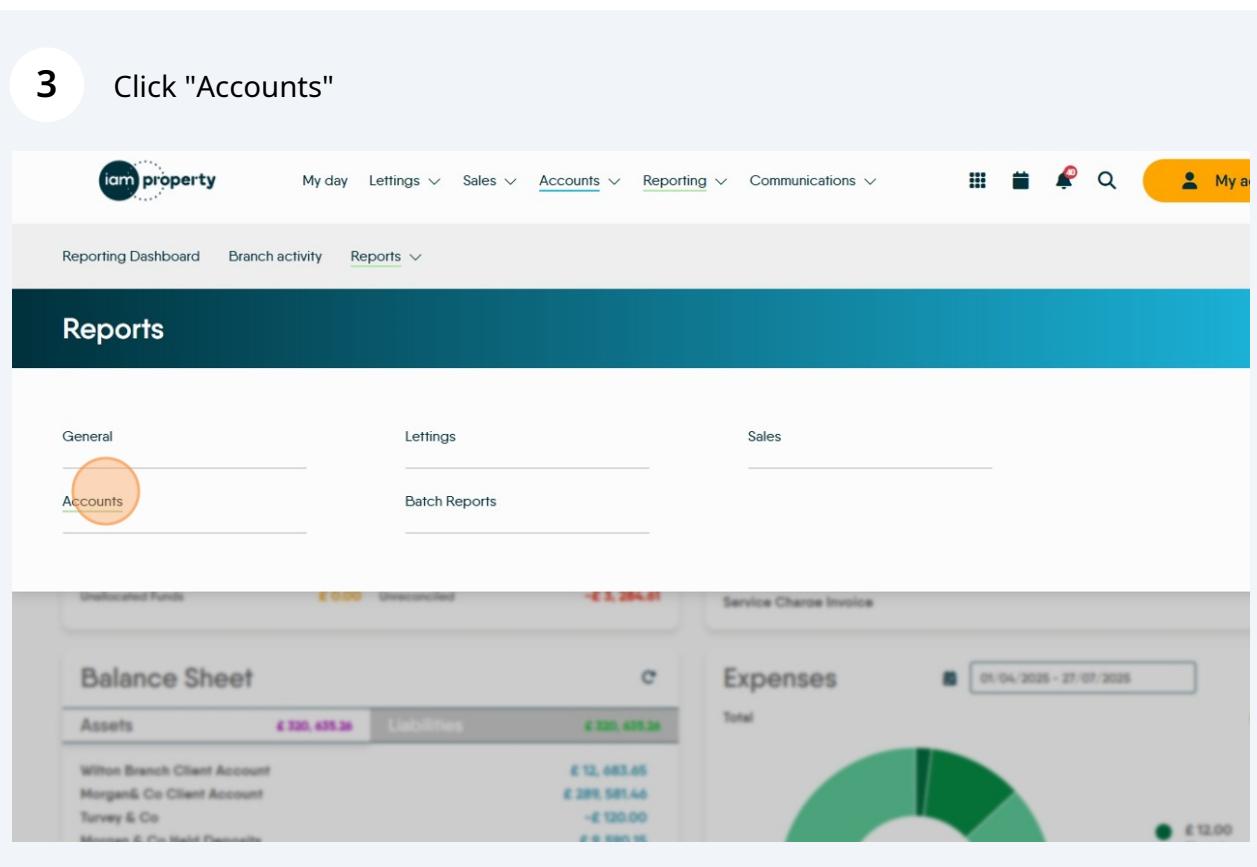
The screenshot shows the iam property CRM dashboard. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting' (which is highlighted with an orange circle), 'Communications', and 'My account'. Below the navigation is a search bar and a 'View All' button. The main content area is divided into several sections: 'Accounts' (with a 'Client Account' summary for 'Organ & Co' and a 'Held Deposits' summary for 'Organ & Co'), 'Invoices' (listing 'Rent Invoice', 'Tenant Fee Invoice', 'Deposit Invoice', and 'Service Charge Invoice' with their respective details), and 'Expenses' (listing a single 'Total' expense of £625.51). Each section includes a 'View All' link for more details.

## 2 Click "Reports"



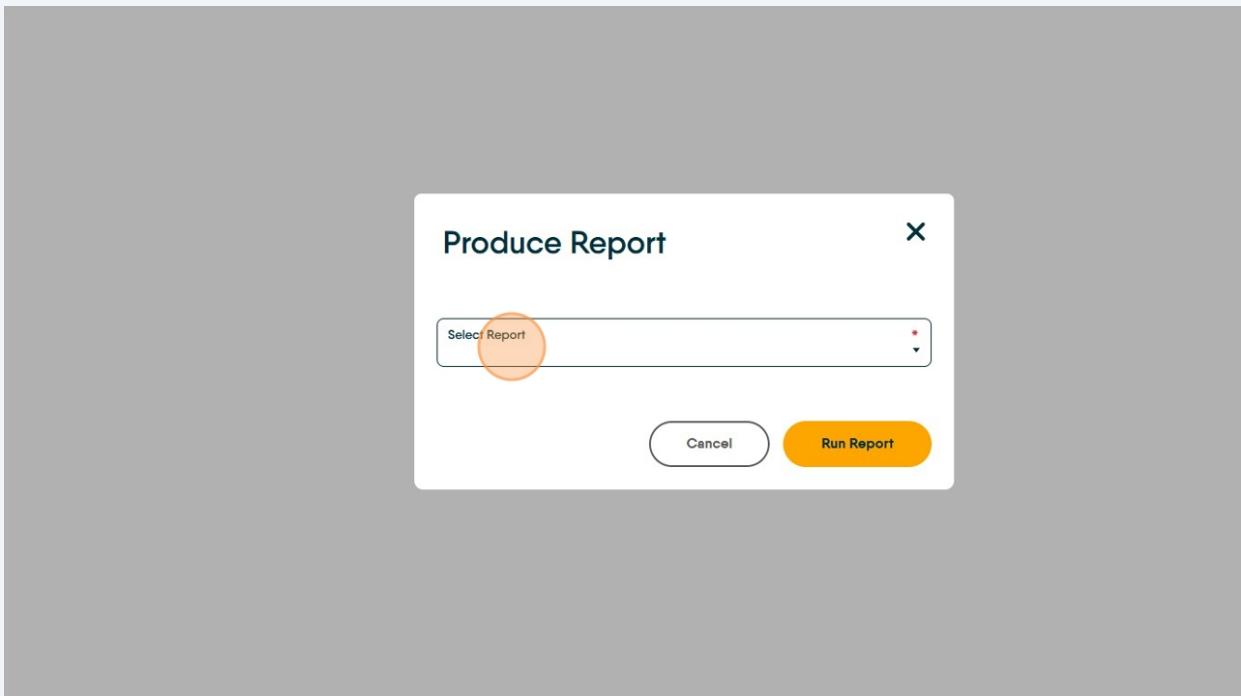
The screenshot shows the iam property software interface. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting' (which is underlined, indicating it is the active section), and 'Communications'. To the right of the navigation bar are icons for a grid, a file, a bell, a search, and a user profile. The main content area is titled 'Reporting Dashboard' and 'Branch activity'. A 'Reports' dropdown menu is open, with the 'Reports' option highlighted and circled in orange. Below this, there are several sections: 'Morgan& Co Client Account' (showing a balance of £286,030.66, with £29,810.10 unallocated funds), 'Morgan & Co Held Deposits' (showing a balance of £9,890.15, with £0.00 unallocated funds), 'Balance Sheet' (showing assets of £330,435.36 and liabilities of £330,435.36), and 'Expenses' (a chart showing total expenses from 01/04/2025 to 27/07/2025). On the right side, there are four small sections: 'Rent Invoice', 'Tenant Fee Invoice', 'Deposit Invoice', and 'Service Charge Invoice', each with a progress bar and some numerical values.

## 3 Click "Accounts"

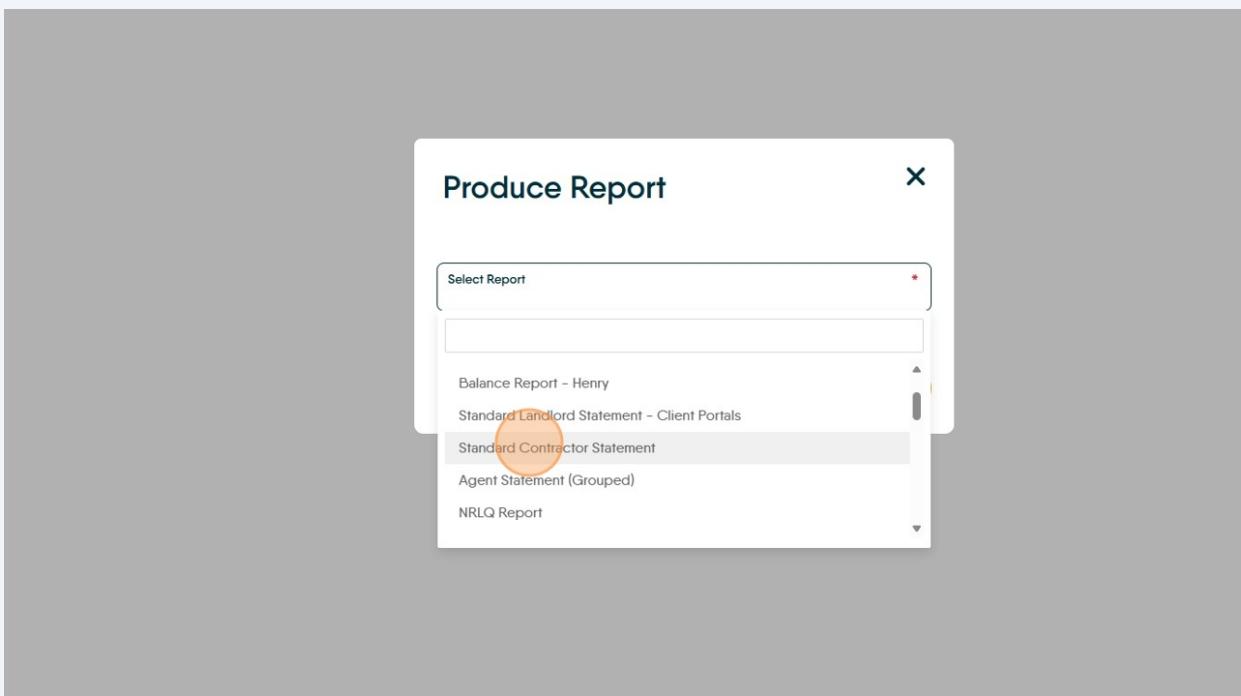


The screenshot shows the iam property software interface, similar to the previous one but with a different active section. The navigation bar at the top includes 'My day', 'Lettings', 'Sales', 'Accounts' (underlined), 'Reporting', and 'Communications'. The 'Reports' dropdown is still open, but the 'Accounts' option is now highlighted and circled in orange. The main content area is titled 'Reports' and includes sections for 'General', 'Lettings', and 'Sales'. Under 'General', there is a 'Batch Reports' link. Below this, there are sections for 'Unallocated Funds' (showing £0.00 unallocated funds), 'Service Charge Invoice' (a chart showing £12,683.65), 'Balance Sheet' (showing assets of £330,435.36 and liabilities of £330,435.36), and 'Expenses' (a chart showing total expenses from 01/04/2025 to 27/07/2025). The 'Accounts' section also includes links for 'Morgan& Co Client Account', 'Wilton Branch Client Account', 'Torrey & Co', and 'Morgan & Co Held Deposits'.

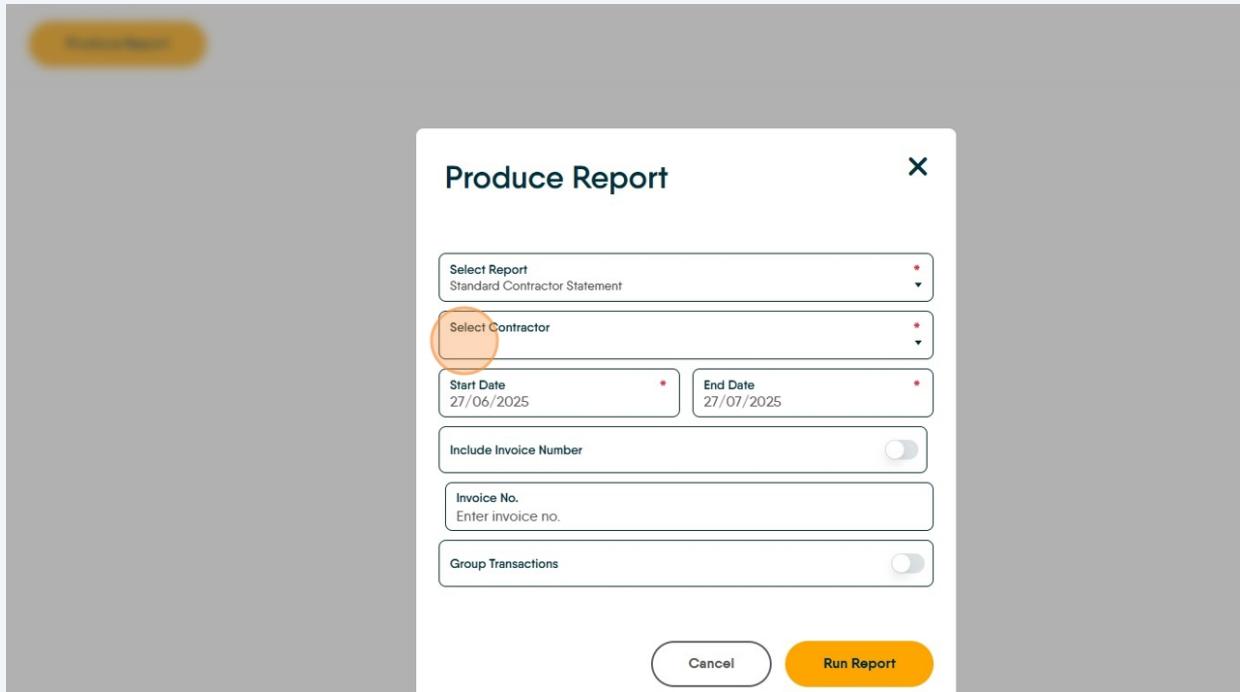
4 Click here, search for and select the report to run.



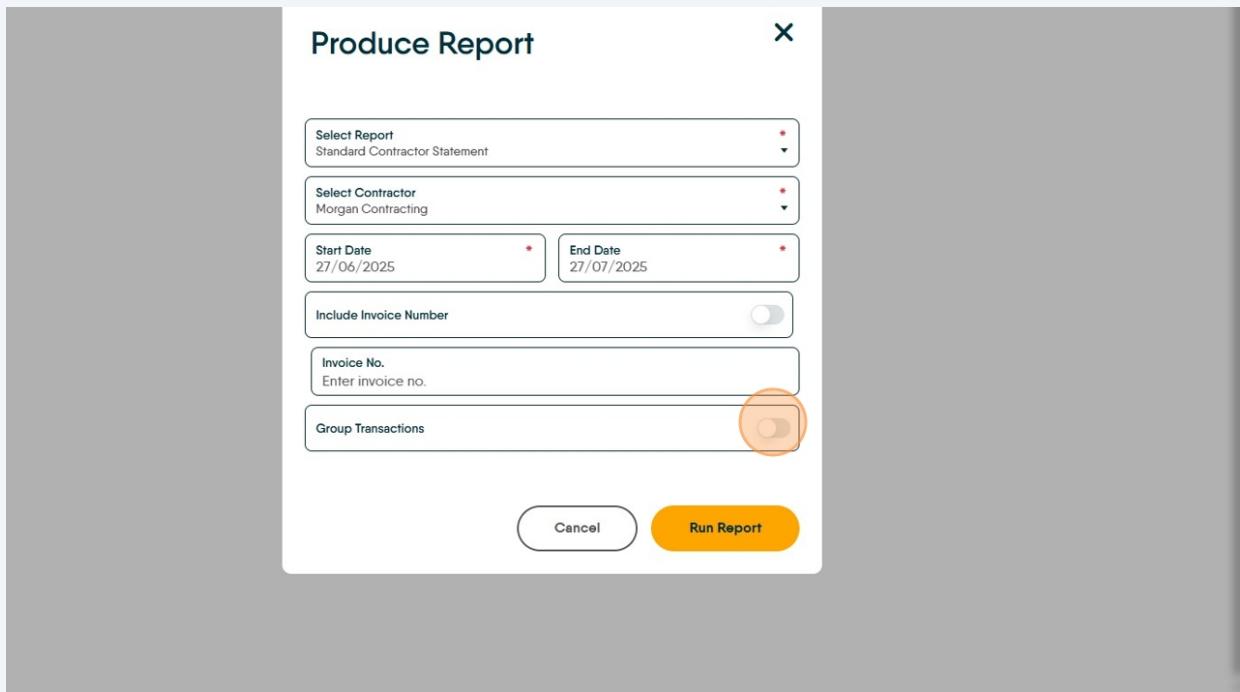
5 In this case, click "Standard Contractor Statement"



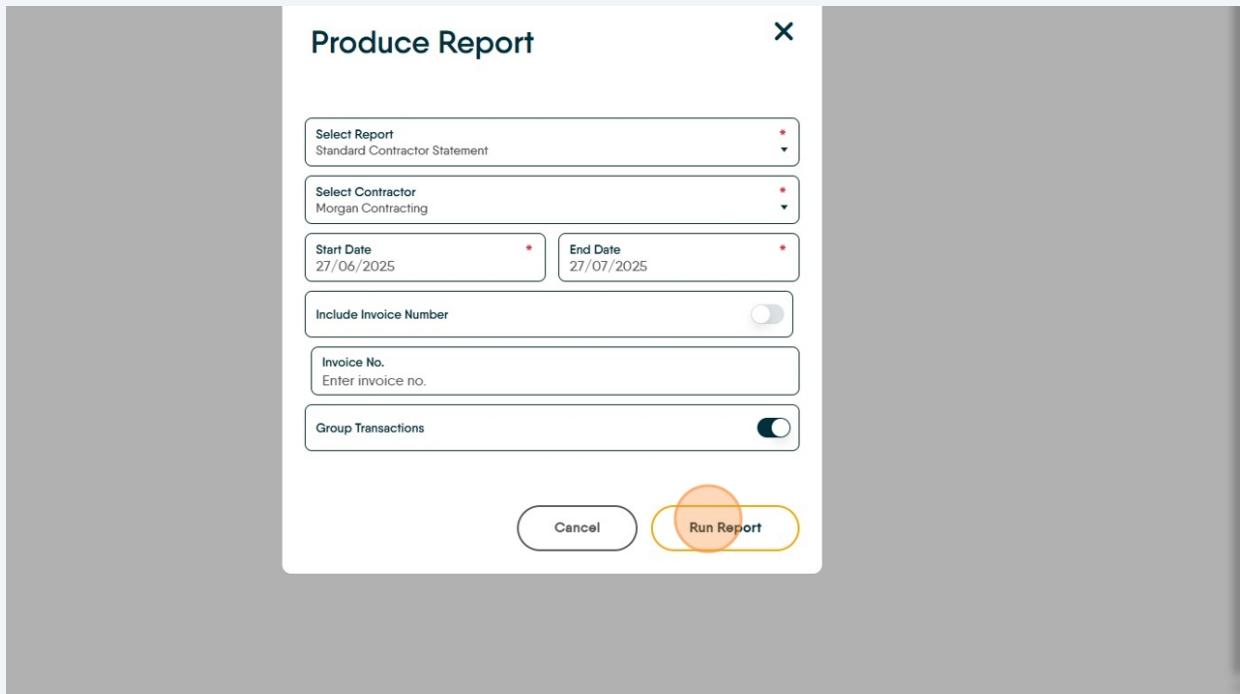
6 Click here to select the contractor you are creating the report for. Search and select from the drop down menu.



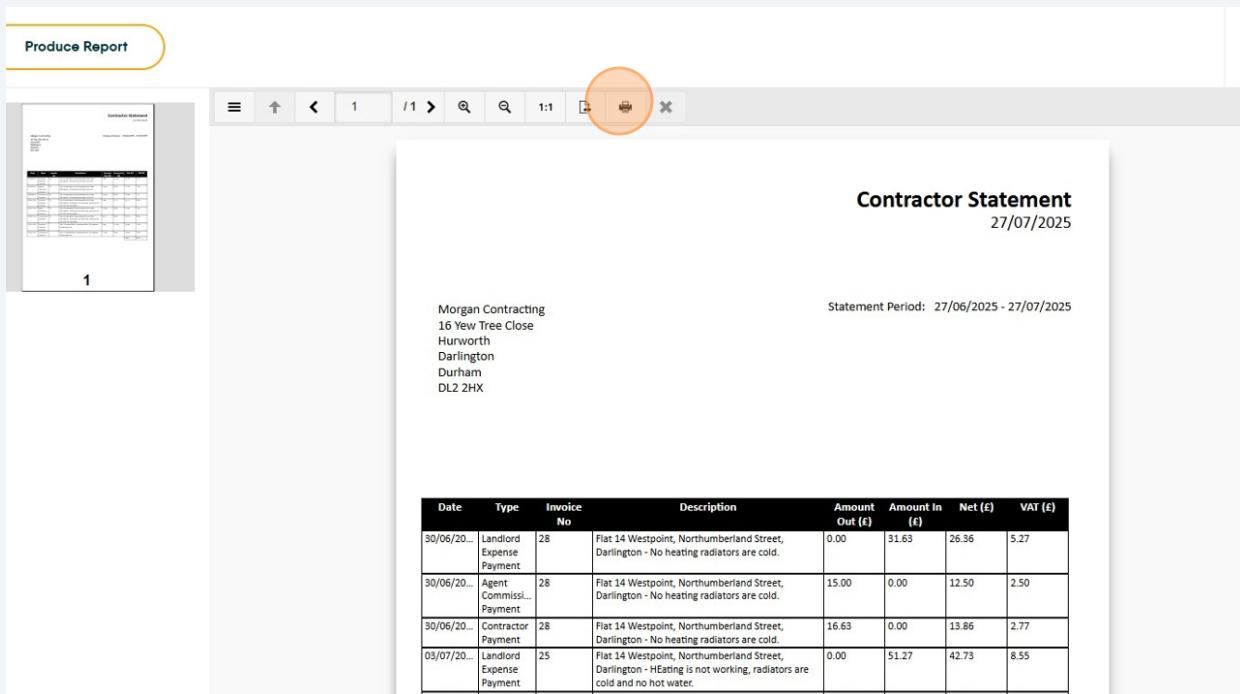
7 If you want to group similar transactions, click here.



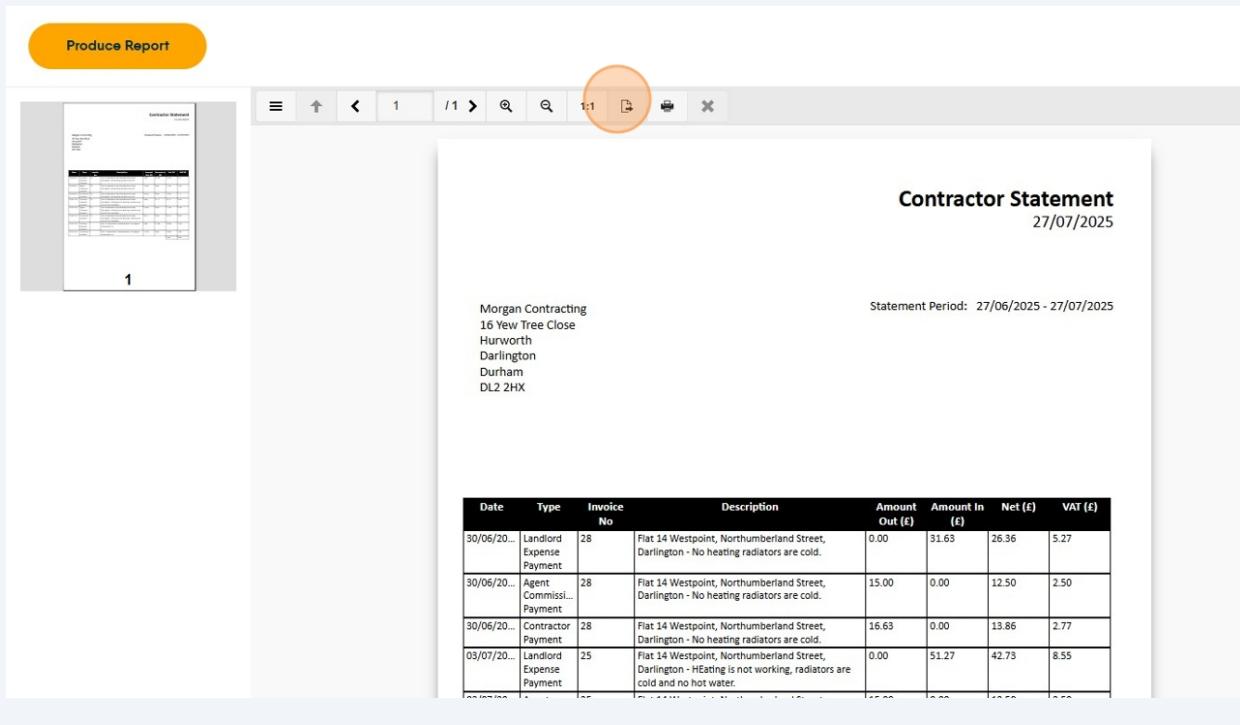
8 Click "Run Report"



9 The report will show on the screen, you now print the report or export it. To print click here.



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



Contractor Statement  
27/07/2025

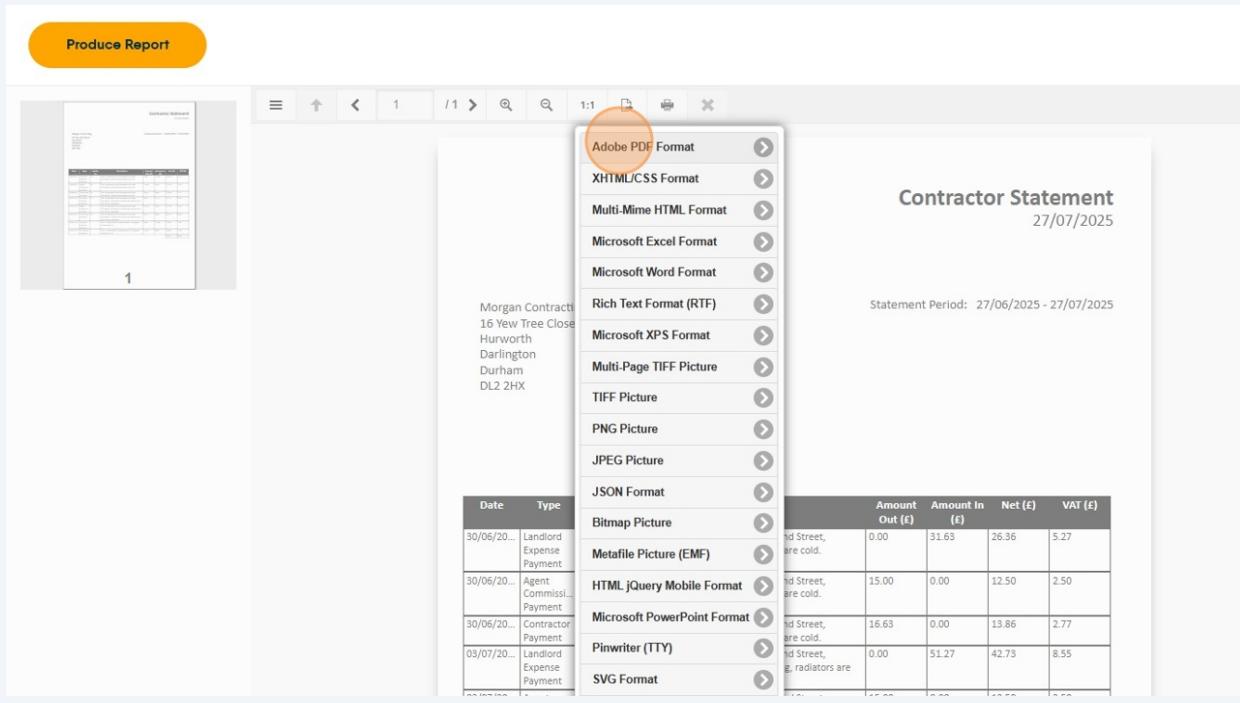
Morgan Contracting  
16 Yew Tree Close  
Hurworth  
Darlington  
Durham  
DL2 2HX

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 Commiss... 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

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.



Contractor Statement  
27/07/2025

Morgan Contracting  
16 Yew Tree Close  
Hurworth  
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Durham  
DL2 2HX

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12

Click here to complete creating your Contractor Statement.

**Contractor Statement**  
27/07/2025

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

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

Date	Type	Invoice No	Description	Amount Out (£)	Amount In (£)	Net (£)	VAT (£)
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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
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

**Sending the Statement to your Contractor via CRM.**

13 Click "Search"

**Invoices**

- Rent Invoice: £ 44,540.00 (Paid), £ 16,185.00 (Due), £ 1,000.00 (Overdue)
- Tenant Fee Invoice: £ 151.00 (Paid), £ 0.00 (Due)
- Deposit Invoice: £ 1,000.00 (Paid), £ 1,000.00 (Due)
- Service Charge Invoice: £ 0.00 (Paid), £ 0.00 (Due)

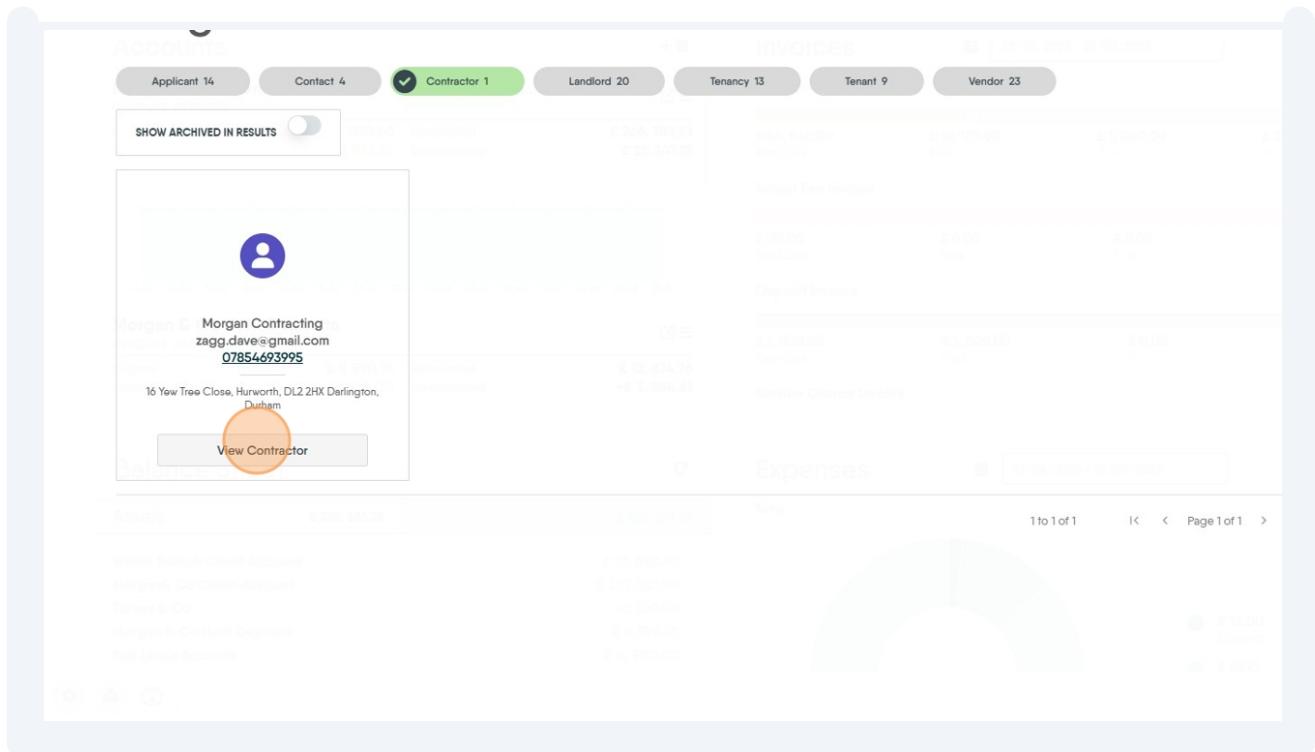
**Expenses**

- Total: £ 625.51

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"

**Contractor 1**

- Mr David Morgan: [david.morgan8@iamproperty.com](mailto:david.morgan8@iamproperty.com), [07711123456](tel:07711123456)
- Leonard Morgan: [freel@morgan.tc](mailto:freel@morgan.tc), [0752658554](tel:0752658554)  
1 Pelew Crescent, DH2 2HX Chester le Street, County Durham
- Mr David Morgan: [david.morgan9@iamproperty.com](mailto:david.morgan9@iamproperty.com), [07711123456](tel:07711123456)
- Mr David Morgan: [david.morgan7@iamproperty.com](mailto:david.morgan7@iamproperty.com), [07711123456](tel:07711123456)  
719 Pelew Crescent, DH2 2HX Chester le Street, County Durham



Applicant 14 Contact 4 Contractor 1 Landlord 20 Tenancy 13 Tenant 9 Vendor 23

SHOW ARCHIVED IN RESULTS

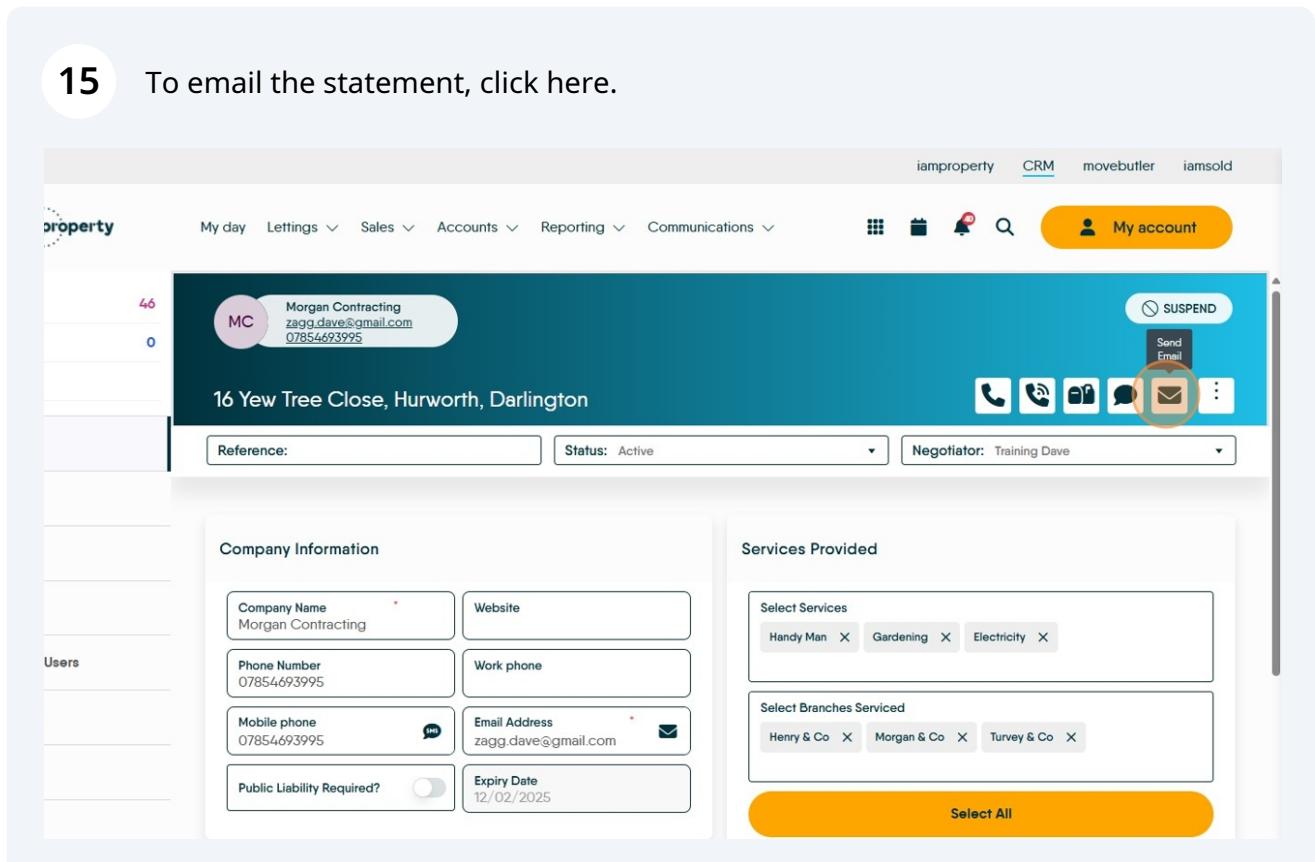
Morgan Contracting  
zagg.dave@gmail.com  
07854693995  
16 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham

View Contractor

Expenses

1 to 1 of 1 | < < Page 1 of 1 > >

15 To email the statement, click here.



My day Lettings Sales Accounts Reporting Communications

46 0

Morgan Contracting  
zagg.dave@gmail.com  
07854693995

16 Yew Tree Close, Hurworth, Darlington

Reference: Status: Active Negotiator: Training Dave

Company Information

Company Name Morgan Contracting	Website
Phone Number 07854693995	Work phone
Mobile phone 07854693995	Email Address zagg.dave@gmail.com
Public Liability Required?	Expiry Date 12/02/2025

Services Provided

Select Services

Handy Man X Gardening X Electricity X

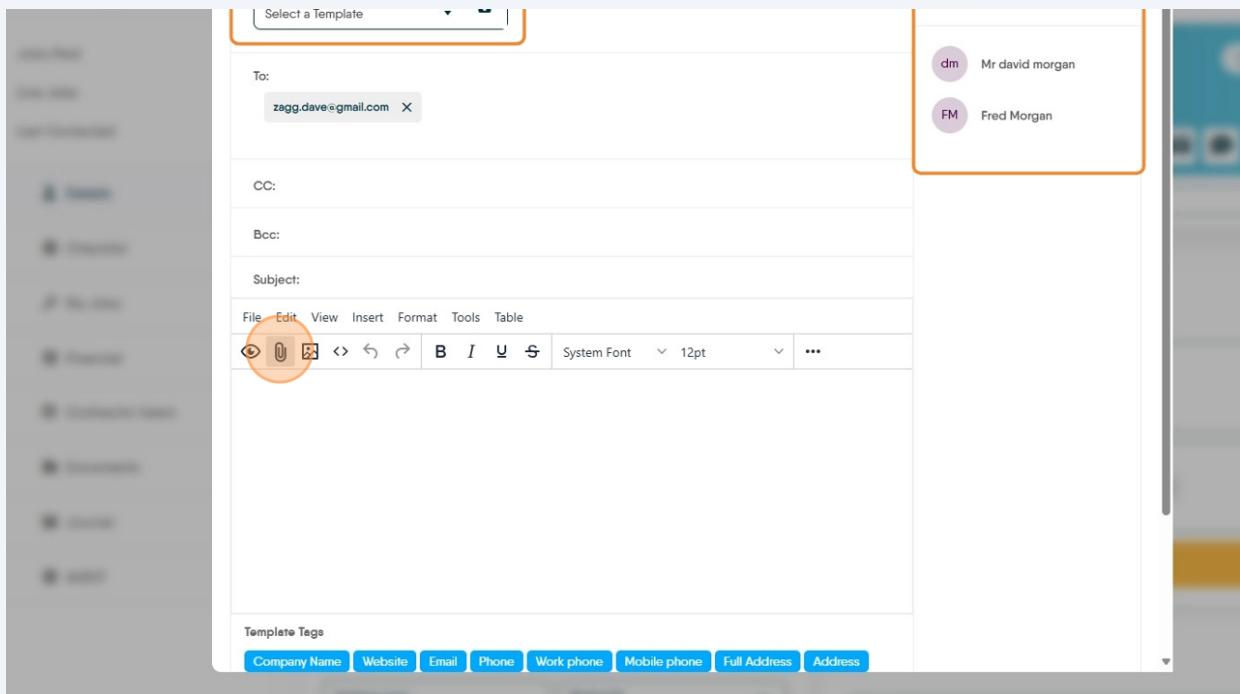
Select Branches Serviced

Henry & Co X Morgan & Co X Turvey & Co X

Select All

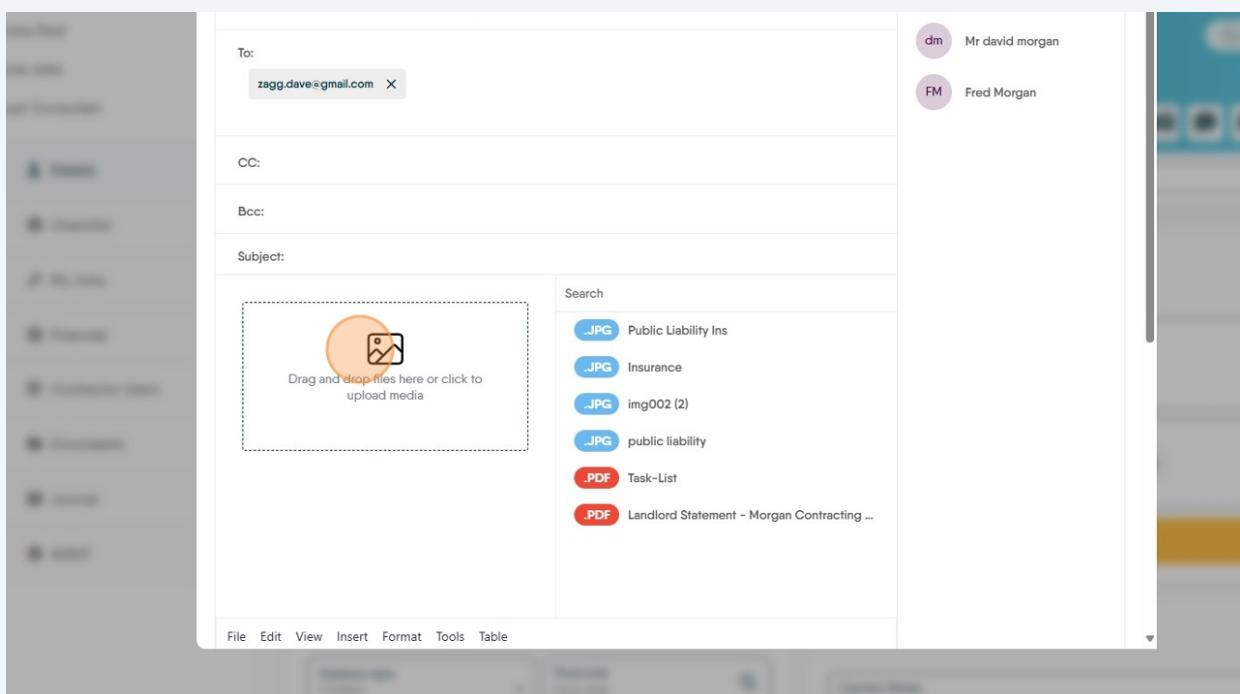
16

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.



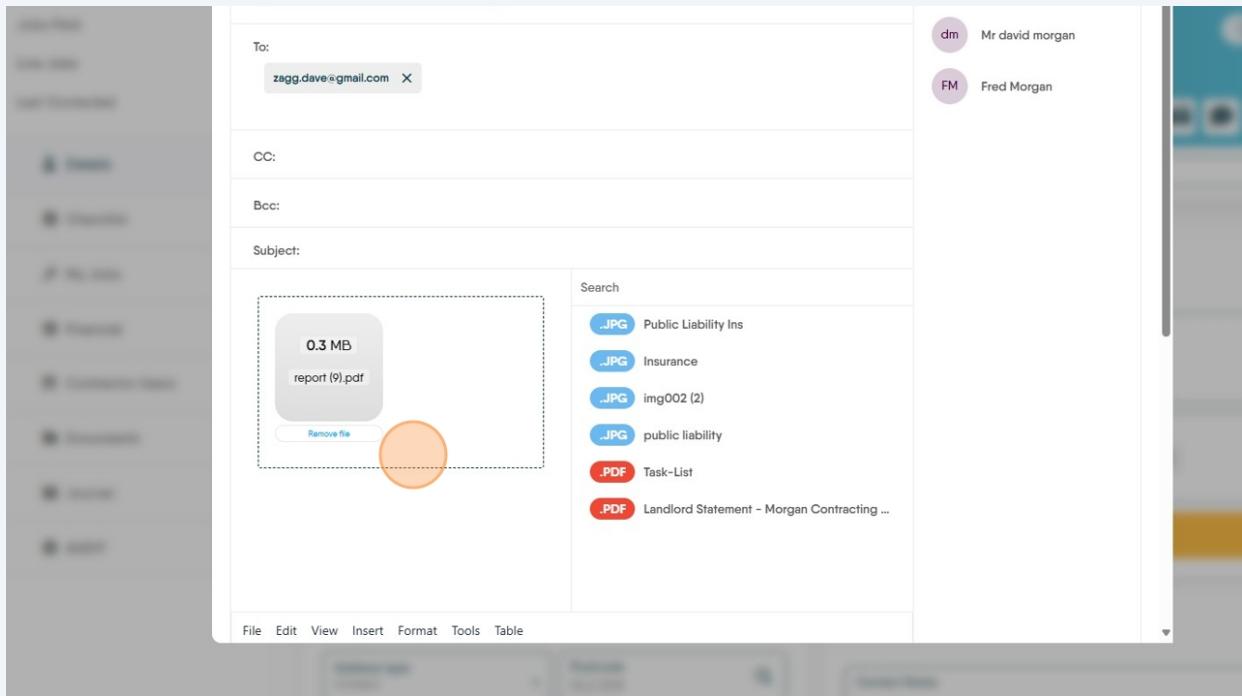
17

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.



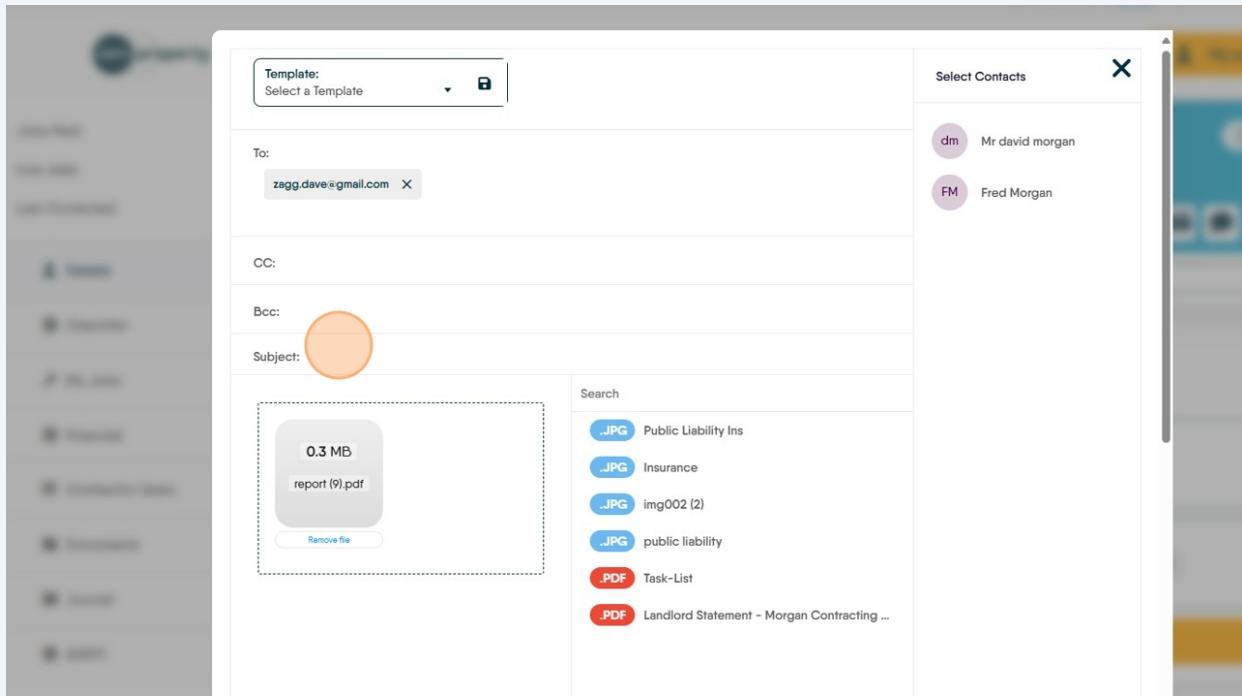
18

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



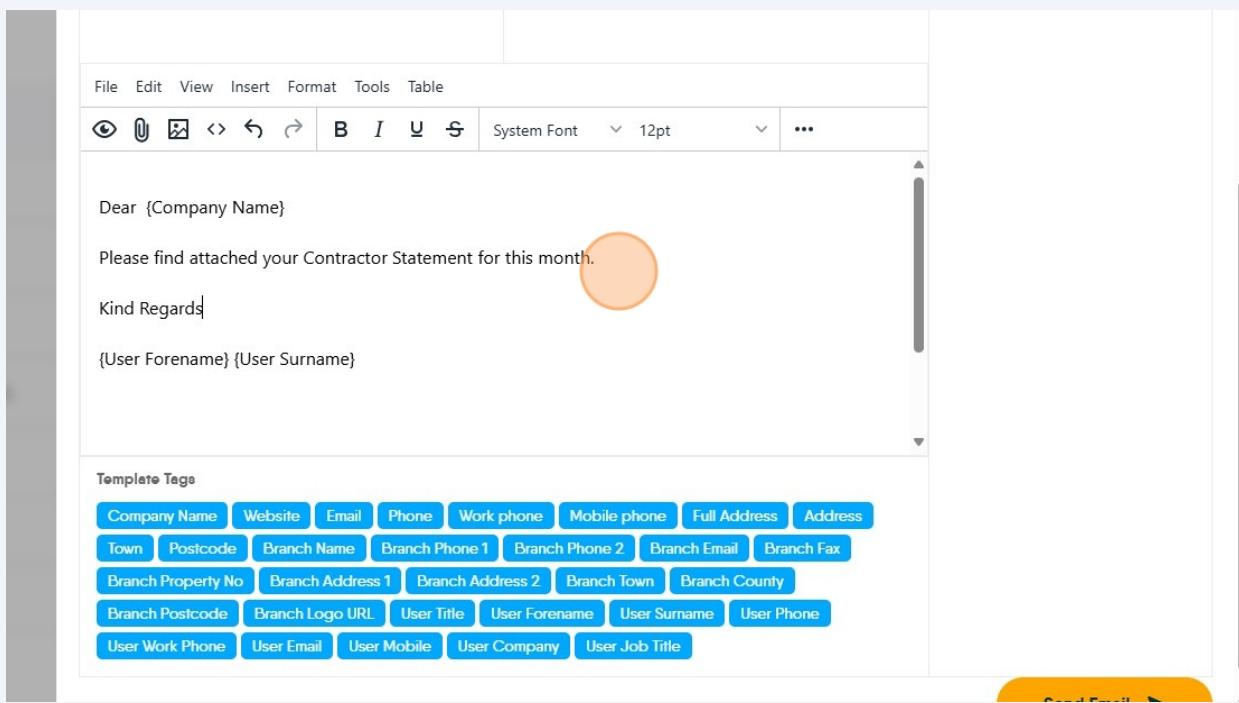
19

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



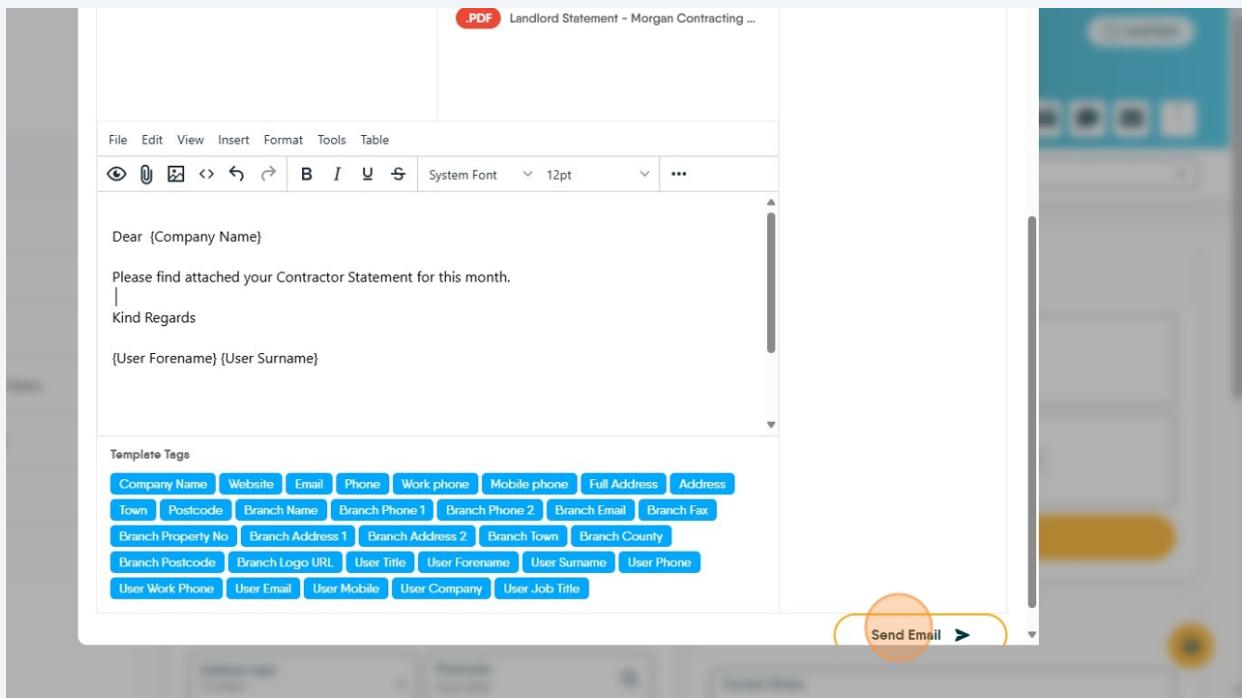
20

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

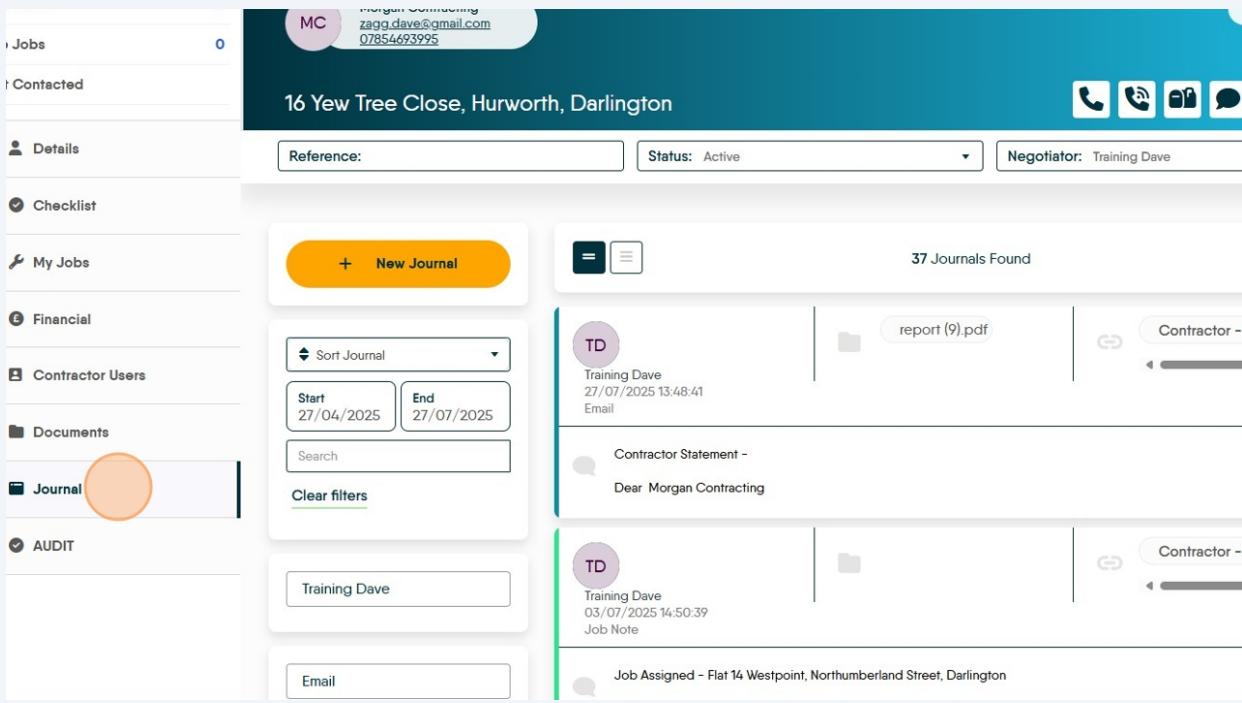


Tip! The Template Tags will automatically show the information shown on the tag e.g. Company Name will show the Contractor Company Name, User Forename will show the forename of the branch user sending the message.

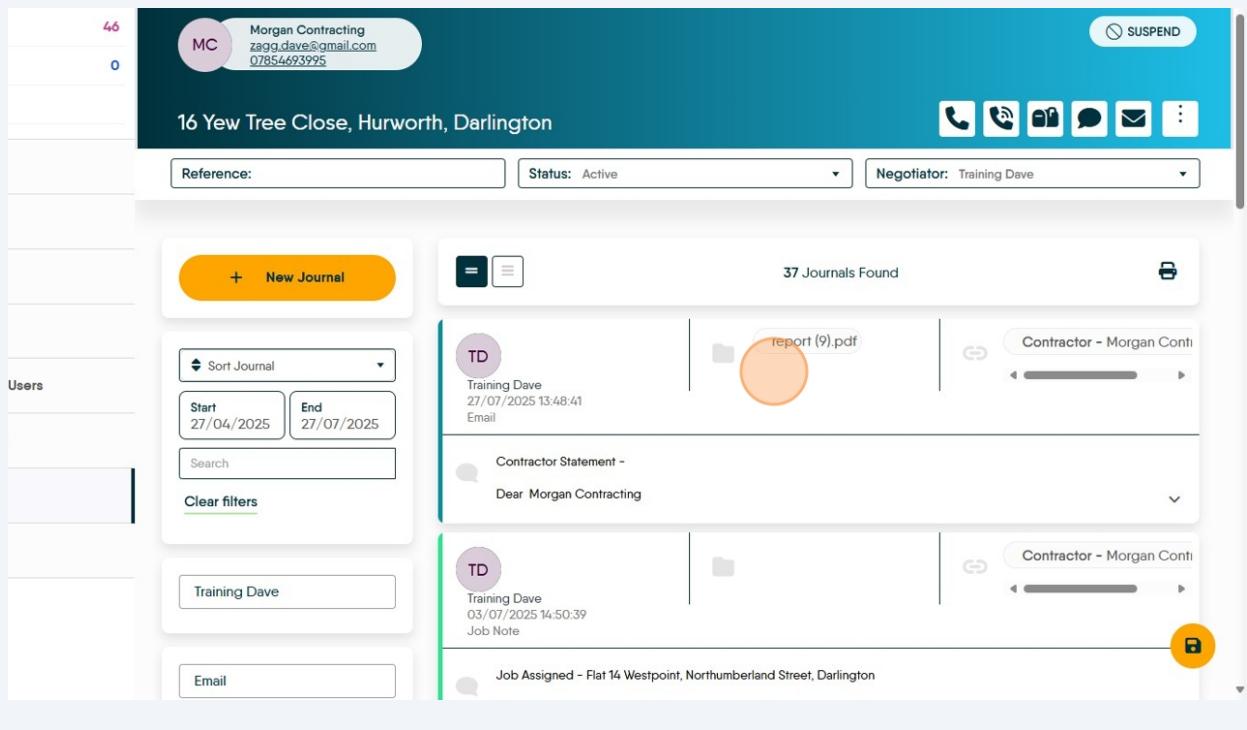
## 21 Once complete click "Send Email"



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

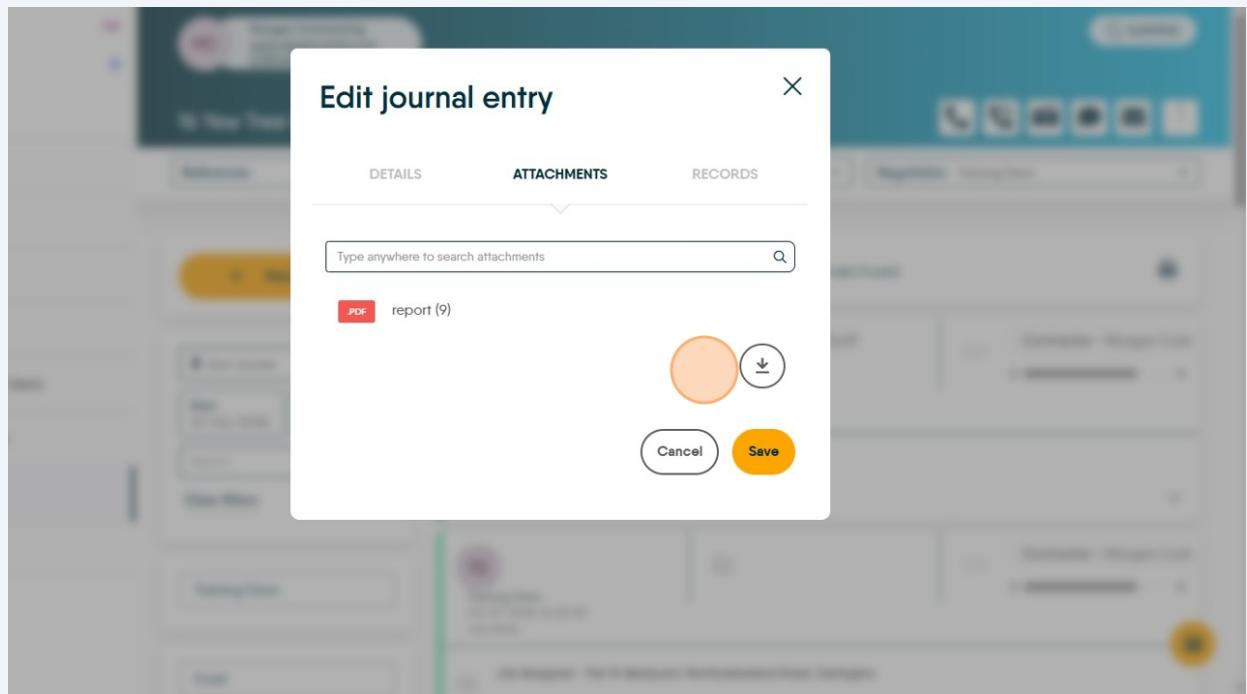


23 Click the report detail, in the middle field.



The screenshot shows a software interface for managing contracts. At the top, there's a header with the company name 'Morgan Contracting' and contact information: 'zagg.dave@gmail.com' and '07854693995'. To the right of the header is a 'SUSPEND' button. Below the header, the address '16 Yew Tree Close, Hurworth, Darlington' is displayed. The main area shows a list of 'Journals' with 37 found. The middle journal entry is highlighted with an orange circle. This entry is from 'Training Dave' on '27/07/2025 13:48:41' and includes a 'Contractor Statement - Dear Morgan Contracting'. Below this, another entry from 'Training Dave' on '03/07/2025 14:50:39' is shown, with a 'Job Note' and a 'Job Assigned' detail. On the left, there's a sidebar for 'Users' with a 'New Journal' button and search filters for 'Start' (27/04/2025) and 'End' (27/07/2025). The bottom of the sidebar shows 'Training Dave' and 'Email' fields.

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'. Inside the dialog, there are three tabs: 'DETAILS', 'ATTACHMENTS', and 'RECORDS'. The 'ATTACHMENTS' tab is selected, showing a list of attachments. One attachment is highlighted with an orange circle: 'report (9)' with a PDF icon. Below the attachment list are 'Cancel' and 'Save' buttons. The background of the dialog shows a blurred view of the software's main interface, which includes a list of journals and a sidebar for users.