# Generating a Financial Statement in CRM

This guide provides a straightforward approach to generating a Financial 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.

> ⚠ **The Reports you see in the the menu shown in this menu (and this guide) are the reports you have requested be added to CRM when on-boarding. You may have the same or different reports to any visible in this guide. If you cannot find a report, or require a new or edited report please speak to Customer Support on crm.support@iamproperty.com Phone; 01865 860 871**

1   Click "Reporting"

2 Click "Reports"

3 Click "Accounts"

4 Click here, search for and select the report to run.
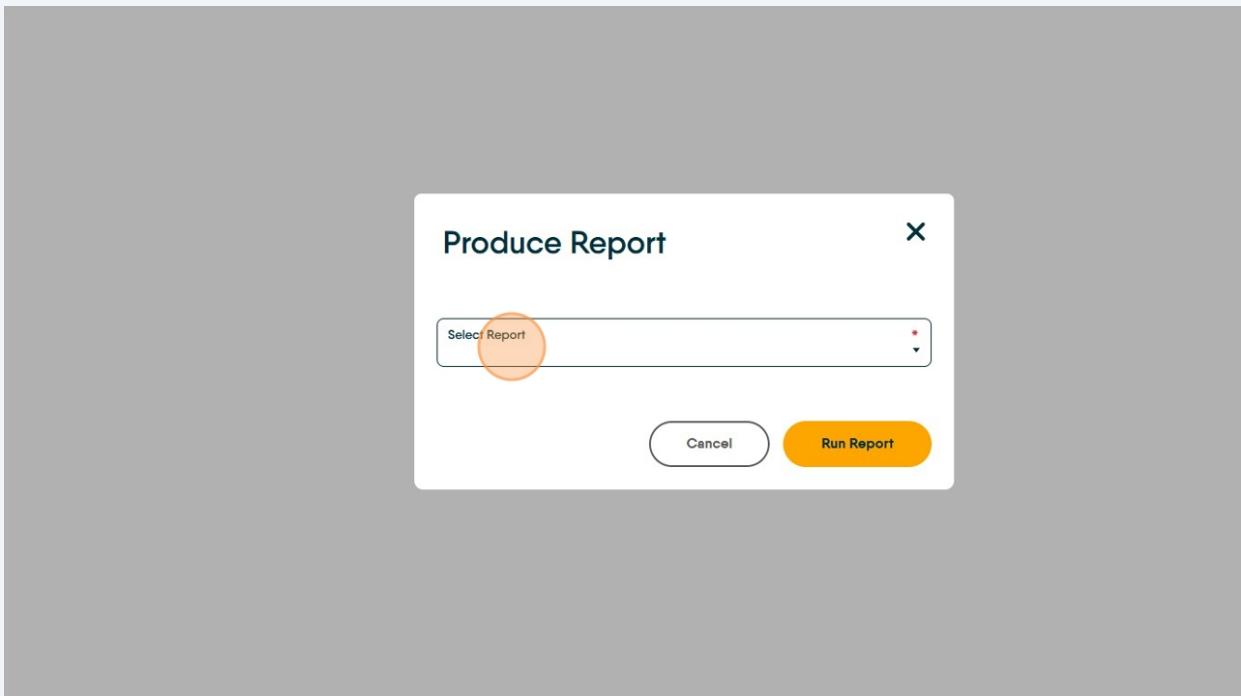
**5** In this case, click "Standard Contractor Statement"
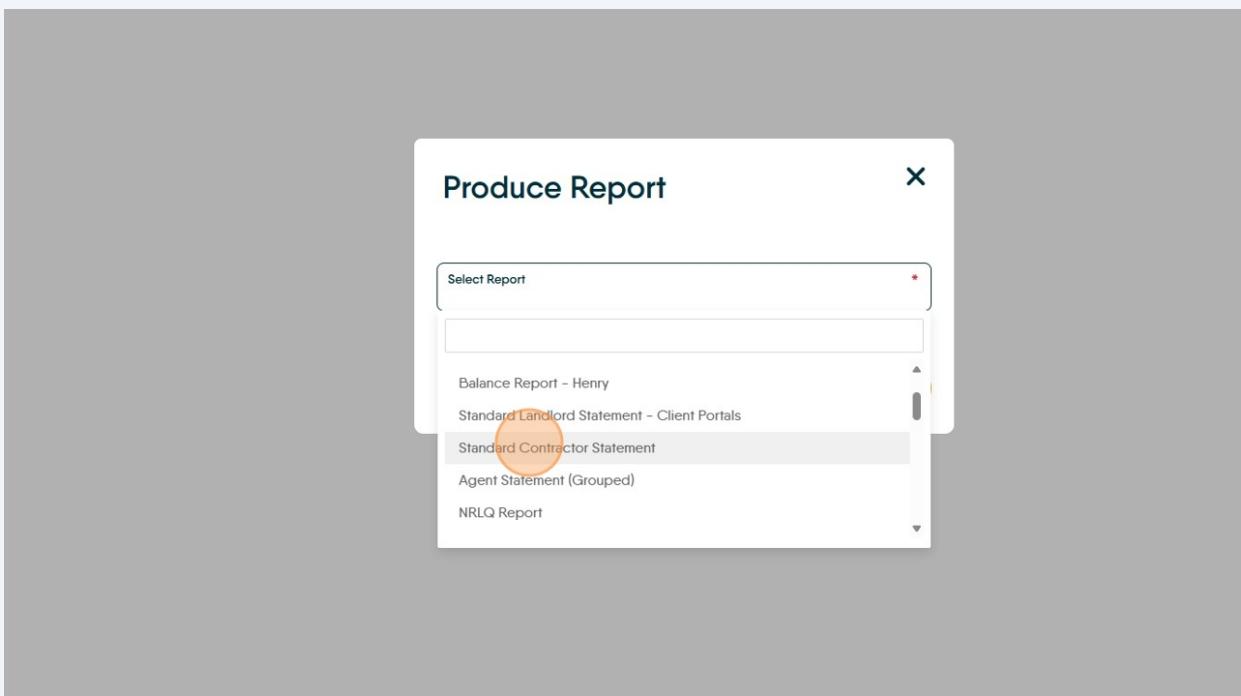
6 Select the Report you want to create, then answer/complete any further steps required. This may be start/end dates, specific Landlords/Contractors/tenants etc.

**7** Once all the additional information is added, click "Run Report"

Produce Report   ✕

Select Report *
Standard Contractor Statement   ▾

Select Contractor *
Morgan Contracting   ▾

Start Date *   End Date *
27/06/2025   27/07/2025

Include Invoice Number   ◯

Invoice No.
Enter invoice no.

Group Transactions   ●

Cancel   Run Report
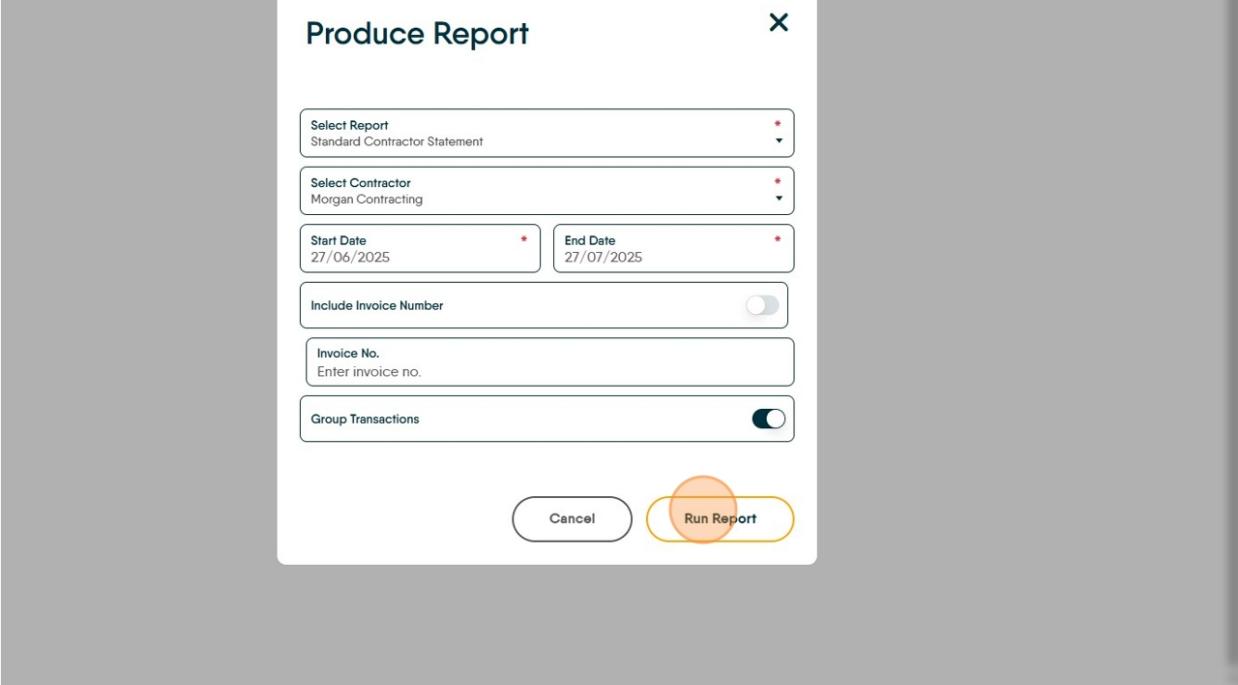
8 Your report will show on the screen, you can now print the report or export it.

To print click here.

9 To export the report to a different file format e.g. PDF or Excel. Click "Export"
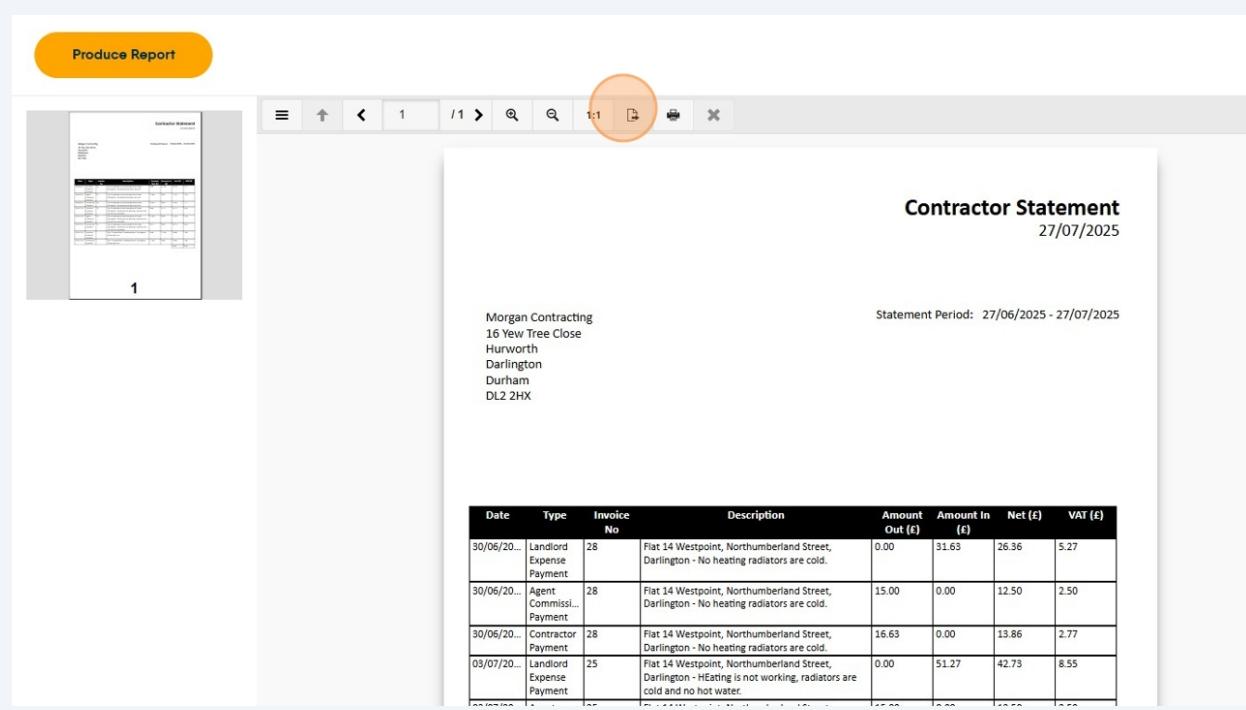
10 For example. Click "Adobe PDF Format" and the file will be exported to PDF and saved in your Downloads folder.

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.
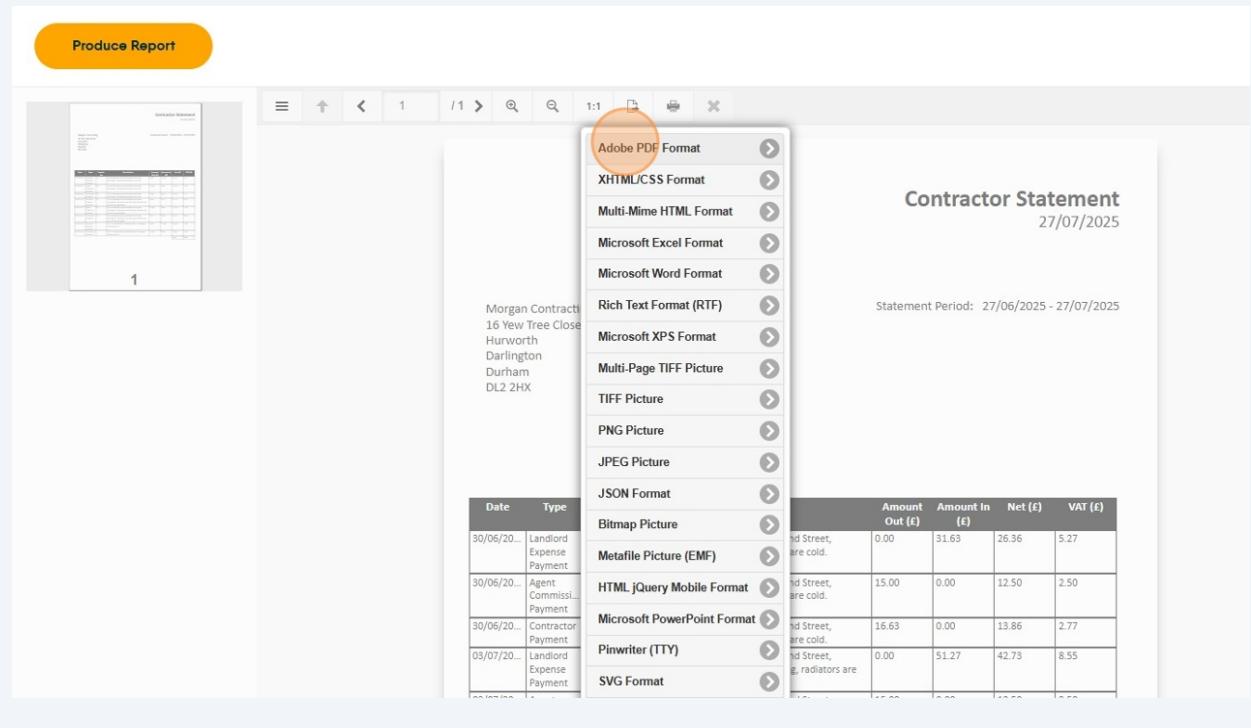
11 Click here to complete creating your report.
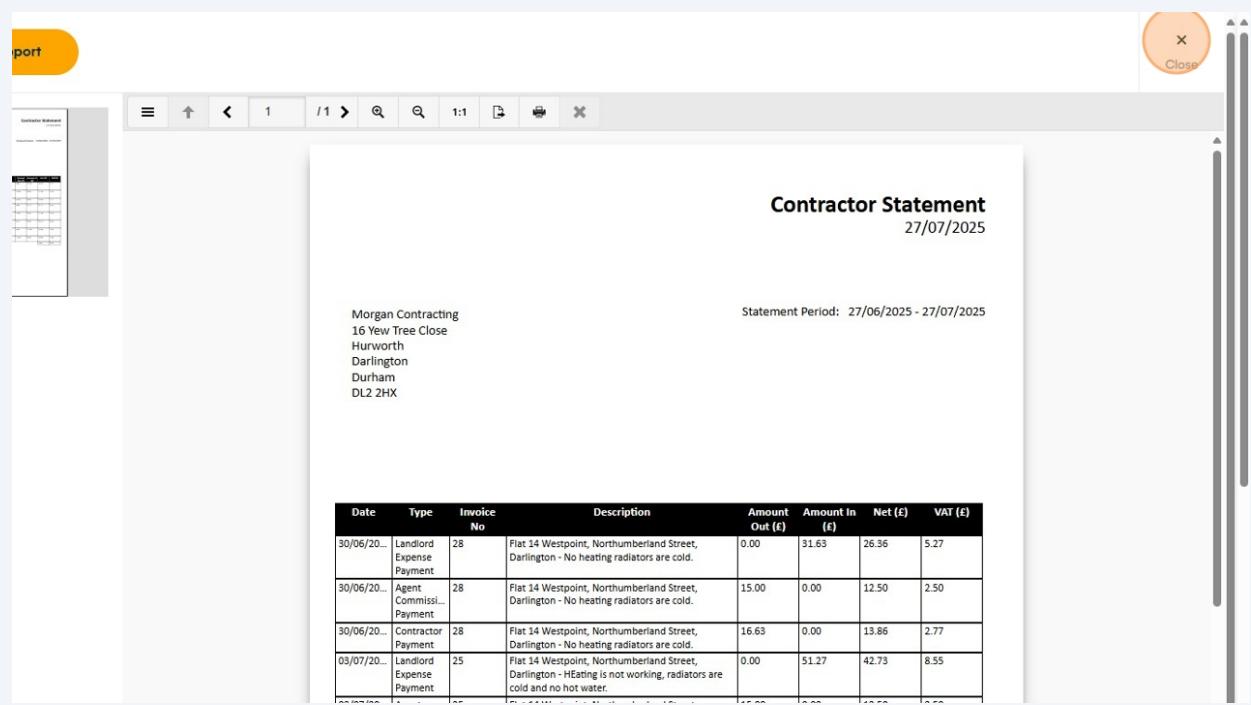
Sending the Statement via CRM email.

12 The report can be sent via the email function in CRM and a record made automatically in the Journal.

13 Click "Search" and search for the record you want to send the report to.

⚠️ Alert! You cannot send an email (or letter/SMS) to, or from, a property. The email has to be sent to, or from, the Vendor or Landlord. However this can be done from the Property Record by clicking on the Vendor or Landlord details in the top left of the screen.

14 In this example we are using a Contractor, the process is the same for any other record type.

Click "View Contractor"

![iam property logo]

morgan

SHOW ARCHIVED IN RESULTS ⬤

Mr David Morgan
david.morgan8@iamproperty.com
07711123456

View Landlord

Leonard Morgan
free@morgan.tc
0752658554

1 Pelaw Crescent, DH2 2HX Chester le Street, County Durham

View Vendor

Mr David Morgan
david.morgan9@iamproperty.com
07711123456

View Vendor

Mr david Morgan
david.morgan7@iamproperty.com
07711123456

719 Pelaw Crescent, DH22HX Chester le Street, County Durham

View Landlord

| 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

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

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.
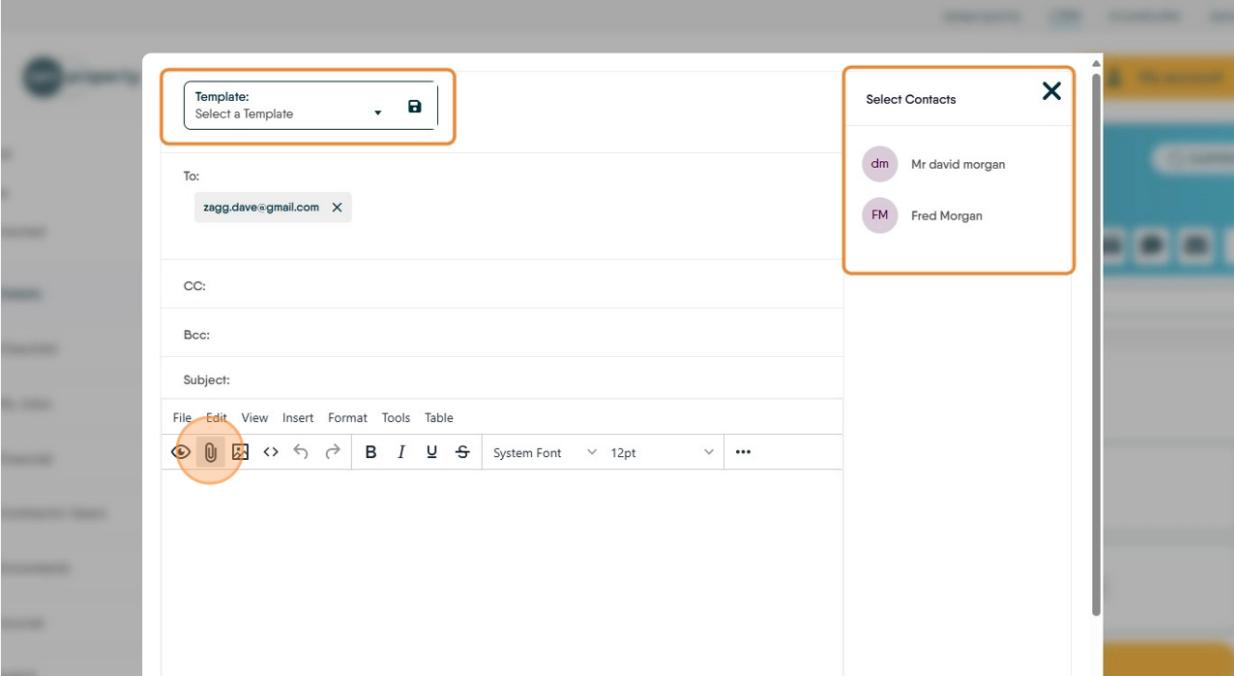
17 Click "Drag and drop files here or click to upload media" to search for the report, if not moved prior the file will show in the 'Downloads' folder of your PC. You will also see any files uploaded to the Contractor record.
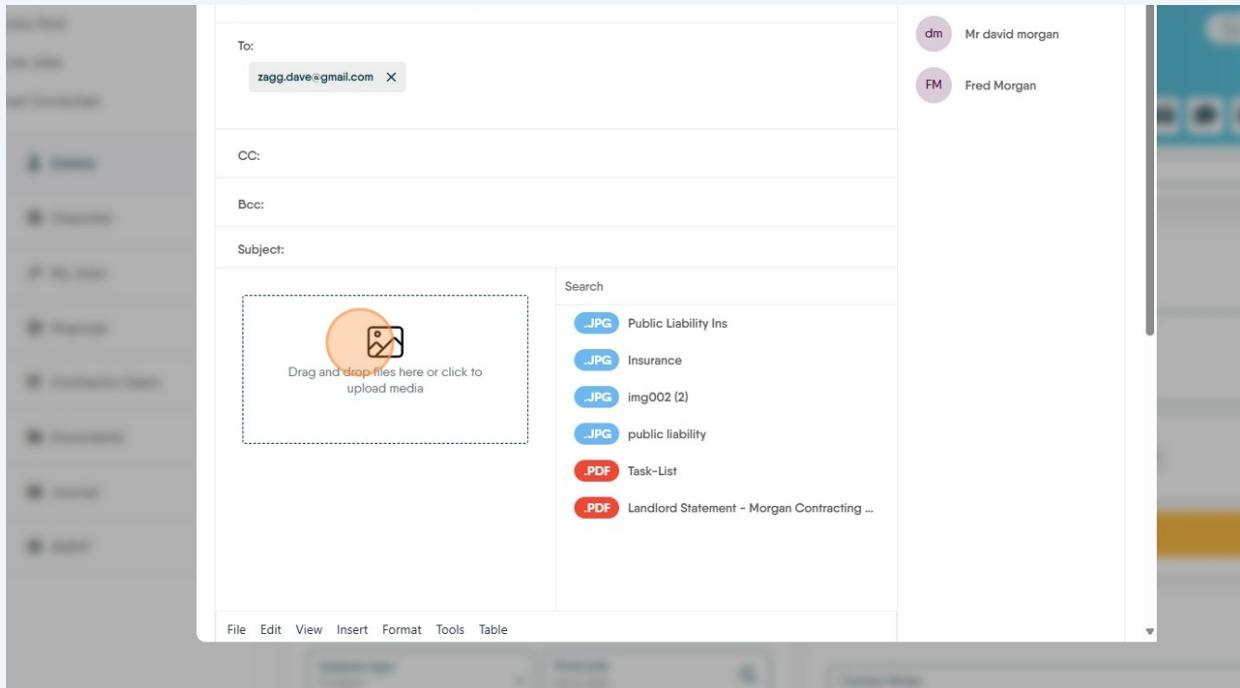
18 Once selected the file detail will show in the box, you can repeat this to add further files.
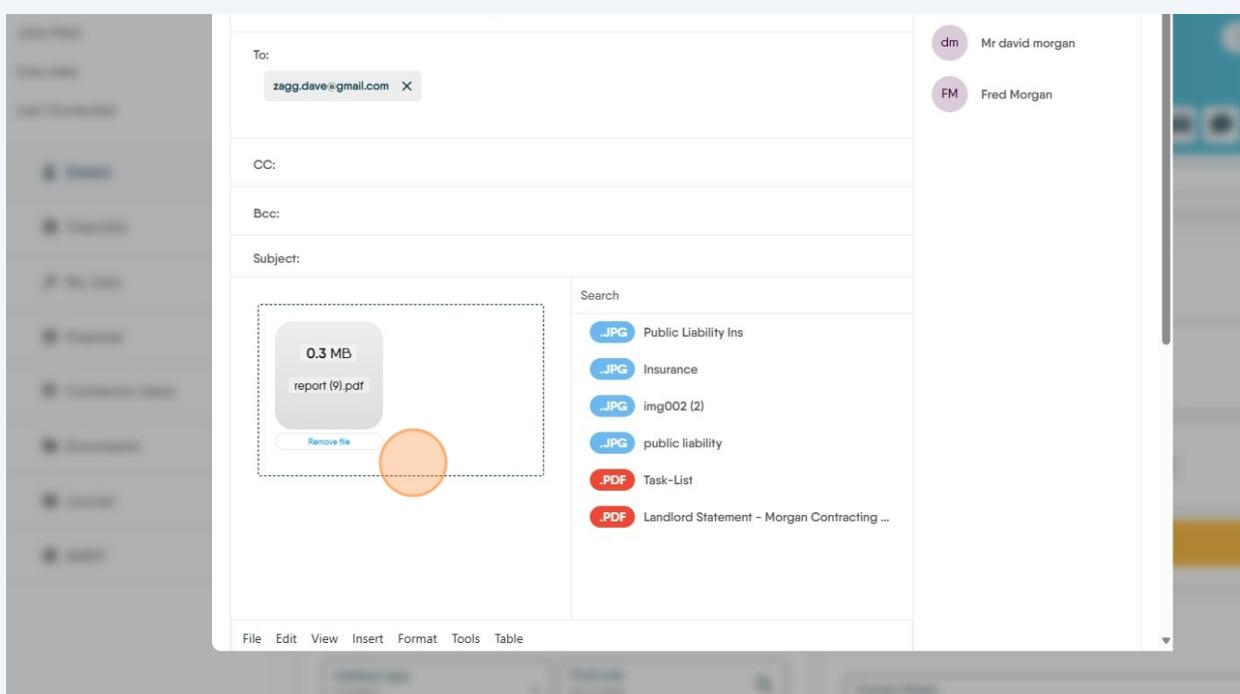
19 Click the "Subject:" field and add the email subject.

Template:
Select a Template

To:
zagg.dave@gmail.com ✕

CC:

Bcc:

Subject:

Select Contacts ✕

dm   Mr david morgan

FM   Fred Morgan

0.3 MB

report (9).pdf

Remove file

Search

.JPG Public Liability Ins

.JPG Insurance

.JPG img002 (2)

.JPG public liability

.PDF Task-List

.PDF Landlord Statement - Morgan Contracting ...
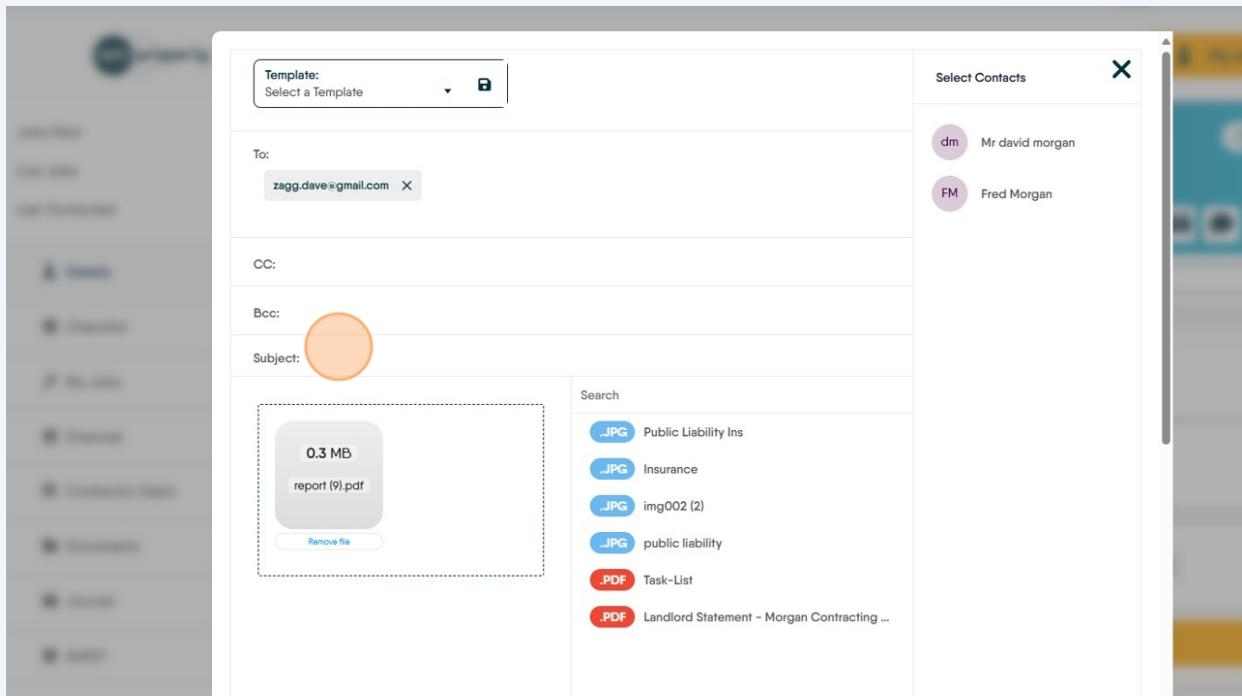
20 If you have selected a previously created message template it will show here, otherwise type your message.
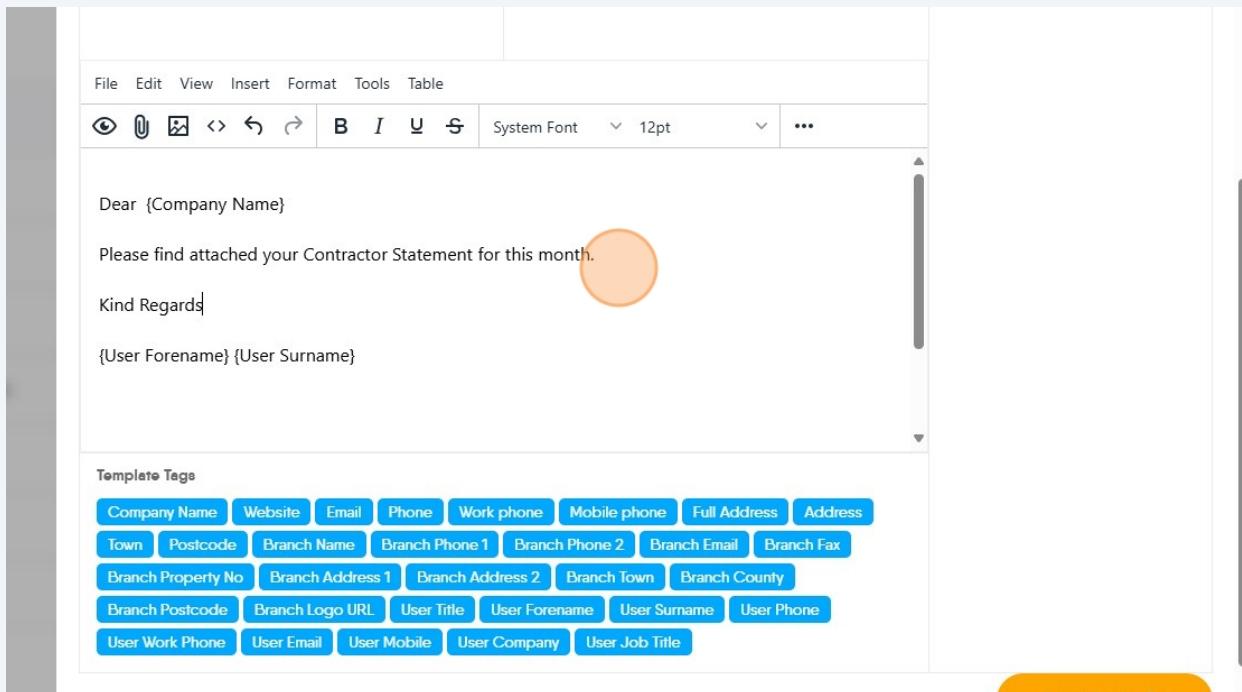
File Edit View Insert Format Tools Table

👁 📎 🖼 <> ↶ ↷   B I U S   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

Send Email ▶

21 Once complete click "Send Email"
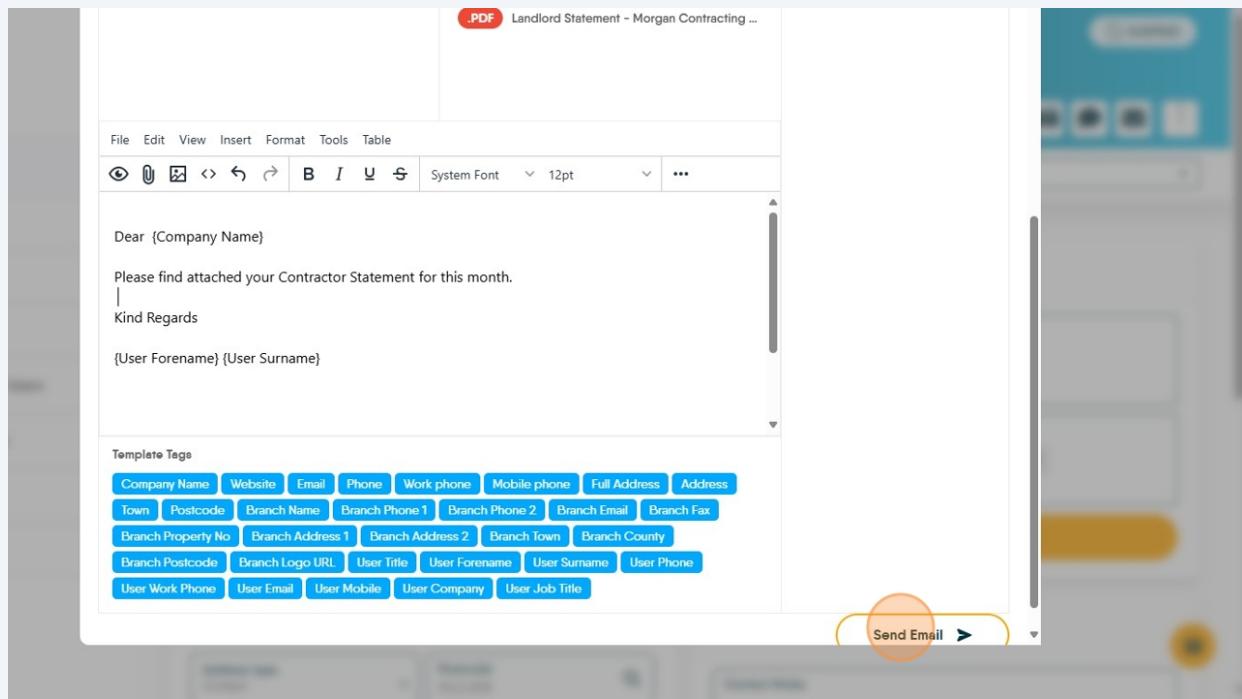
22 The message sent will show in the Journal. Click "Journal" to view

Jobs   0

Contacted

👤 Details

✓ Checklist

🔧 My Jobs

ⓔ Financial

📇 Contractor Users

📁 Documents

📘 Journal

✓ AUDIT

MC   Morgan Contracting
zagg.dave@gmail.com
07854693995

16 Yew Tree Close, Hurworth, Darlington

Reference: Status: Active ▾   Negotiator: Training Dave

+ New Journal

⇅ Sort Journal ▾

Start 27/04/2025   End 27/07/2025

Search

Clear filters

Training Dave

Email

37 Journals Found

TD   Training Dave 27/07/2025 13:48:41 Email   report (9).pdf   Contractor –

Contractor Statement –
Dear Morgan Contracting

TD   Training Dave 03/07/2025 14:50:39 Job Note   Contractor –

Job Assigned – Flat 14 Westpoint, Northumberland Street, Darlington

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23 Click the report detail, in the middle field.

46
0

MC   Morgan Contracting
zagg.dave@gmail.com
07854693995

⊘ SUSPEND

16 Yew Tree Close, Hurworth, Darlington

Reference: Status: Active ▾   Negotiator: Training Dave ▾

Users

+ New Journal

⇅ Sort Journal ▾

Start 27/04/2025   End 27/07/2025

Search

Clear filters

Training Dave

Email

37 Journals Found 🖨

TD   Training Dave 27/07/2025 13:48:41 Email   report (9).pdf   Contractor – Morgan Cont⋯

Contractor Statement –
Dear Morgan Contracting   ⌄

TD   Training Dave 03/07/2025 14:50:39 Job Note   Contractor – Morgan Cont⋯

Job Assigned – Flat 14 Westpoint, Northumberland Street, Darlington

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