

Making Tax Digital - Generating Monthly Landlord Statements



This guide provides a step-by-step process for Estate Agents to generate monthly statements for landlords to assist with the requirements placed on Agents and Landlords by the HMRC Making Tax Digital platform.

By following these instructions, Agents can assist landlords with their reporting, ensuring compliance and accurate financial tracking.



Tip! If you grant your Landlords access to the Landlord Portal they can use the Statements option in there to create a Landlord Statement for themselves.

1

There are 2 ways that a Landlord statement can be created. The one is via the ['Statement Merge'](#) option in the Accounts - Landlord - Statement Merge menu. The other is via the [Reports](#) menu selecting the Accounts option then picking the report you want to create from there.

We advise that you use a **Consolidated Landlord Statement** as this will provide all the information the landlord requires. One document will contain the required details for each property controlled by the Landlord.

Reports Menu

2

This is easiest place to create a report for a Landlord, unless your accounts processes fit with the the monthly statement requirement of the HMRC. A report can be created from here at anytime of the month and for any date range that CRM contains the data for.

3 Click "Reporting"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Reporting' menu item is circled in orange. Below the navigation bar, there is a 'Welcome back, Training' message and three action buttons: 'Add New Record', 'View property management', and 'Visit help centre'. A search bar is present below these buttons. The main content area is divided into two sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a single event at 12:00 with the name 'Test test'. The 'My tasks' section shows a table with three tasks: 'test', 'goodfellows task', and 'Onboarding', all with a status of 'Not Started' and a priority of 'High'.

Time	Name
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	test	High	19/Jun/2025	19/Jun/2025
Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025
Not Started	Onboarding	High	03/Sept/2025	03/Sept/2025

4 From the menu click "Reports"

The screenshot shows the iamproperty CRM dashboard with the 'Reporting' menu item expanded. The 'Reports' sub-menu item is circled in orange. The dashboard content is dimmed, showing the same 'Welcome back, Training' message and action buttons as in the previous screenshot. The 'Today's events' and 'My tasks' sections are also visible but dimmed.

Time	Name
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	test	High	19/Jun/2025	19/Jun/2025
Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025
Not Started	Onboarding	High	03/Sept/2025	03/Sept/2025

5 Click "Accounts"

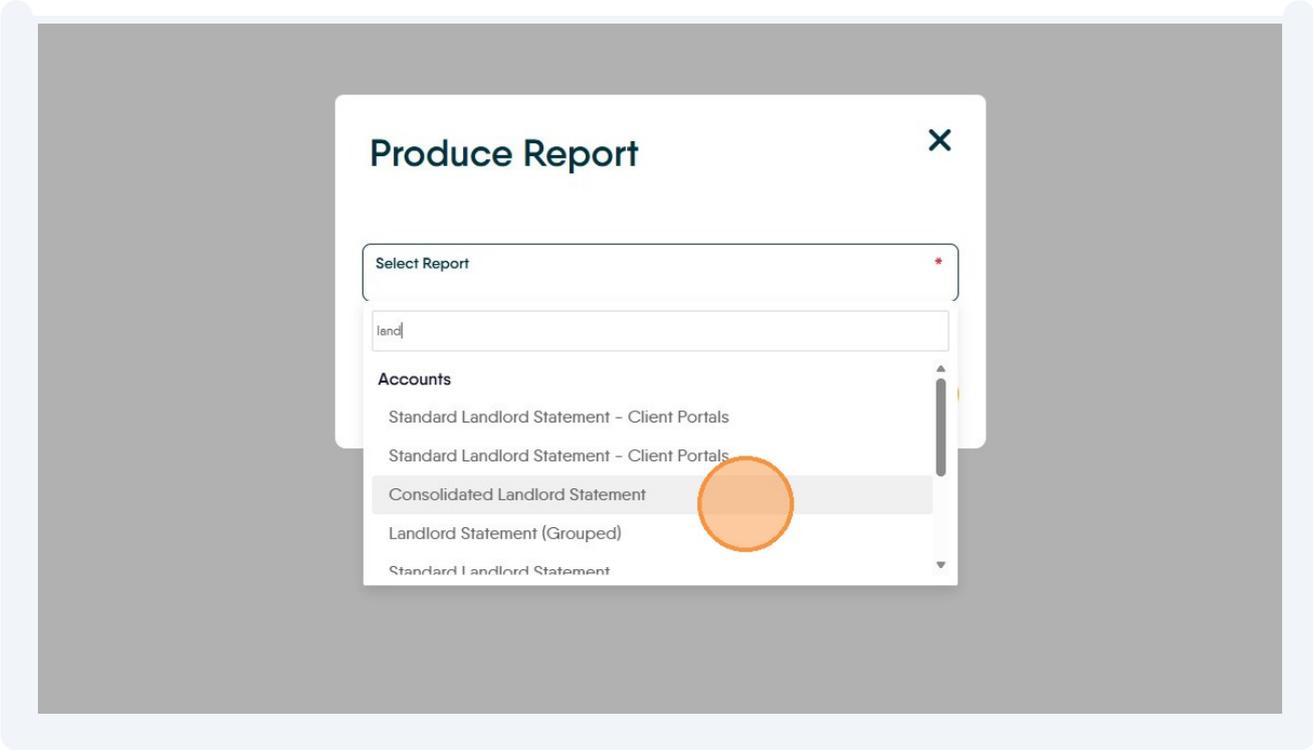
The screenshot shows the 'iam property' Reporting Dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Reports' section is active, showing three categories: 'General', 'Lettings', and 'Sales'. Under 'General', the 'Accounts' report is highlighted with an orange circle. Below the reports, there are two tables. The first table, titled 'My day's events', has columns for 'Time' and 'Name'. The second table, titled 'My tasks', has columns for 'Status', 'Name', 'Priority', 'Start date', and 'Due date'. The 'My tasks' table contains four rows of tasks, all with a status of 'Not Started' and a priority of 'High'.

Time	Name
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	test	High	19/Jun/2025	19/Jun/2025
Not Started	goodfellows test	High	01/Jul/2025	01/Jul/2025
Not Started	Onboarding	High	03/Sept/2025	03/Sept/25
Not Started	Check	High	24/Sept/2025	24/Sept/25

6 Click "Select Report" and from the drop down menu pick the report you want to send. In this example we selected "Consolidated Landlord Statement"

The screenshot shows a 'Produce Report' dialog box. The dialog has a title bar with a close button (X). Below the title, there is a dropdown menu labeled 'Select Report' with an orange circle highlighting the text. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Run Report'.

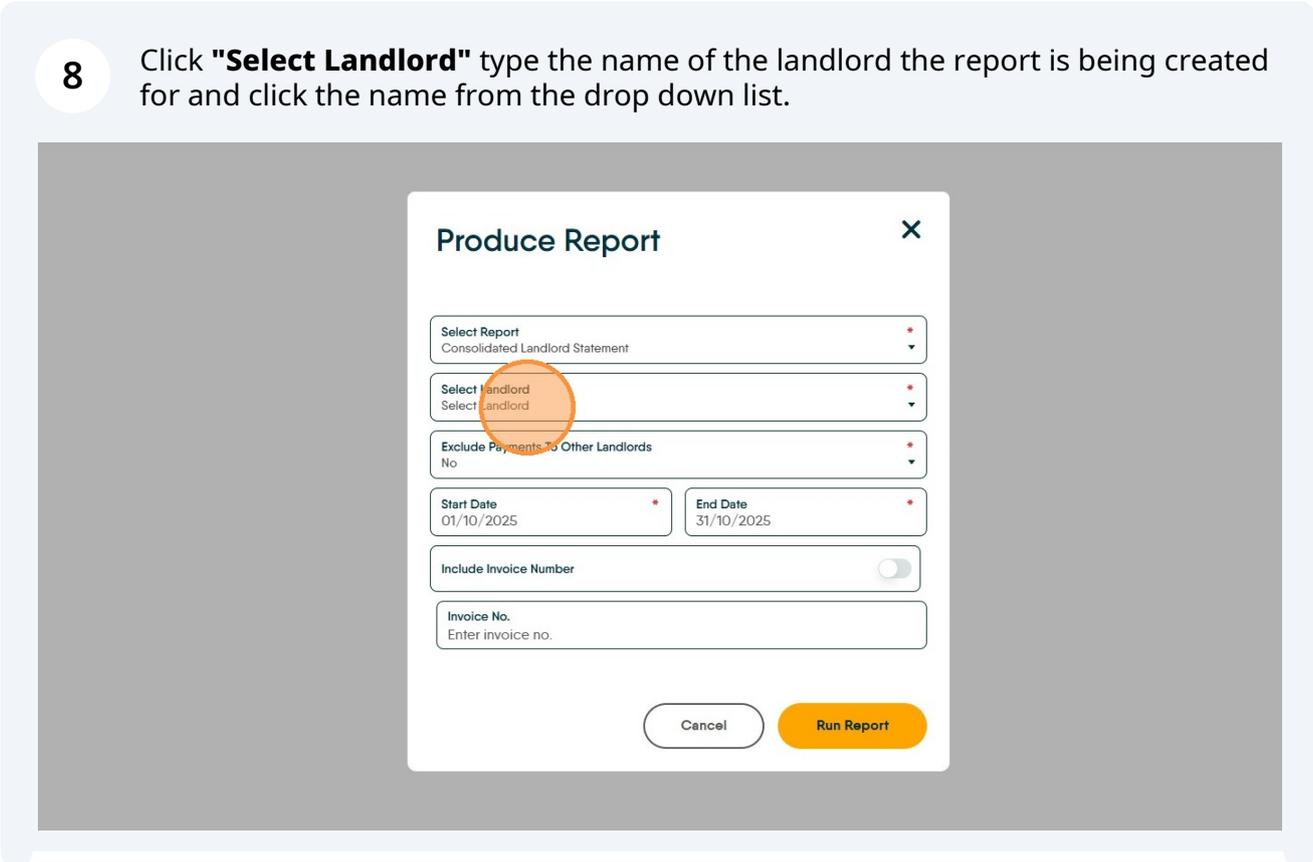


7

Once the report is created you will be presented with some options. These will vary depending on the type of report to be created. We have selected "Consolidated Landlord Statement" the menu shown in the example below is for this type of report.

8

Click "**Select Landlord**" type the name of the landlord the report is being created for and click the name from the drop down list.



Produce Report



Select Report
Consolidated Landlord Statement

Select Landlord
Select Landlord

Arthur Morgan

01/10/2025 31/10/2025

Include Invoice Number

Invoice No.
Enter invoice no.

Cancel

Run Report

9 Click the "**Start Date**" field.

Produce Report



Select Report
Consolidated Landlord Statement

Select Landlord
Select Landlord

Exclude Payments To Other Landlords
No

Start Date
17/10/2025

End Date
17/11/2025

Include Invoice Number

Invoice No.
Enter invoice no.

Cancel

Run Report

10

Select the **"Start Date"** for this type of report this will (most likely) be 1st of the month.

The screenshot shows the 'Produce Report' form with the following fields and values:

- Select Report: Consolidated Landlord Statement
- Select Landlord: Select Landlord
- Exclude Payments To Other Landlords: No
- Start Date: 17/10/2025
- End Date: 17/11/2025

A date picker is open for the Start Date field, showing the month of October 2025. The date 17 is selected, and the date 1 is circled in orange, indicating the intended selection.

11

Click the **"End Date"** field.

The screenshot shows the 'Produce Report' form with the following fields and values:

- Select Report: Consolidated Landlord Statement
- Select Landlord: Select Landlord
- Exclude Payments To Other Landlords: No
- Start Date: 01/10/2025
- End Date: 17/11/2025

The End Date field is circled in orange, indicating it is the target of the next step.

Produce Report



Select Report
Consolidated Landlord Statement

Select Landlord
Select Landlord

Exclude Payments To Other Landlords
No

Start Date
01/10/2025

End Date
30/11/2025

Include Invoice Number

Invoice No.
Enter invoice no.

30 November 2025
Sunday

← November 2025 →

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

12 Click "Run Report"

Produce Report



Select Report
Consolidated Landlord Statement

Select Landlord
Arthur Morgan

Exclude Payments To Other Landlords
No

Start Date
01/10/2025

End Date
31/10/2025

Include Invoice Number

Invoice No.
Enter invoice no.

Cancel

Run Report

13

Click If you ant to export the report to Email or Print, select 1 of the 2 highlighted icons. Export (left icon) will allow the report to be exported in various formats inc PDF, Word etc. The right icon, allows the document to be Printed

Produce Report

Consolidated Landlord Statement

17/

Mr Arthur Morgan
41 Barrett Road
Darlington
County Durham
DL3 8LA

Statement
01/10/2025 - 3

Date	Type	Description	Debit	Credit	Current Balance
01/10/2025	Landlord Bank Receipt - BACS Transfer	Float for Carlton Moor	£ 0.00	£ 500.00	£ 500.00
		Transfer from 8 Carlton Moor Crescent,			

Via Statement Merge

14

Click "Accounts"

iamproperty CRM movebutler

iamproperty My day Lettings Sales Accounts Reporting Communications My acc

Communications

SMS Inbox Email Tracker Mail Merge

Email Merge E-Sign Marketing toolkit

SMS Merge

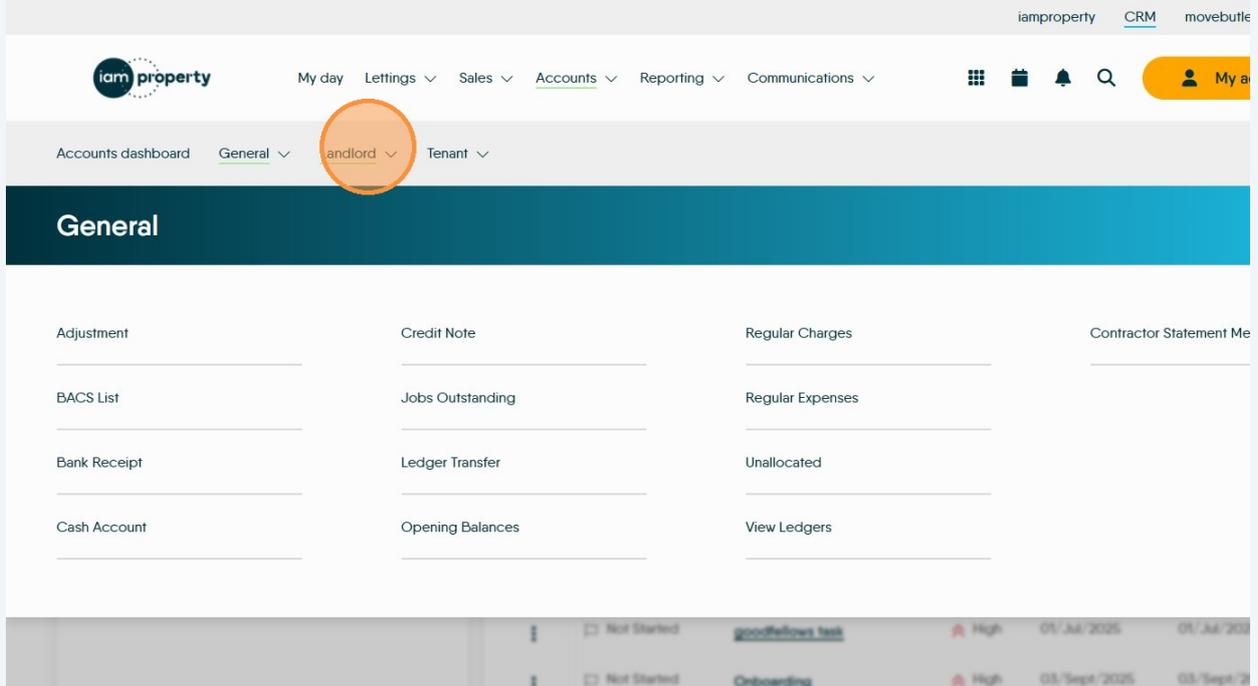
Today's events

Time	Name
12:00	Test test

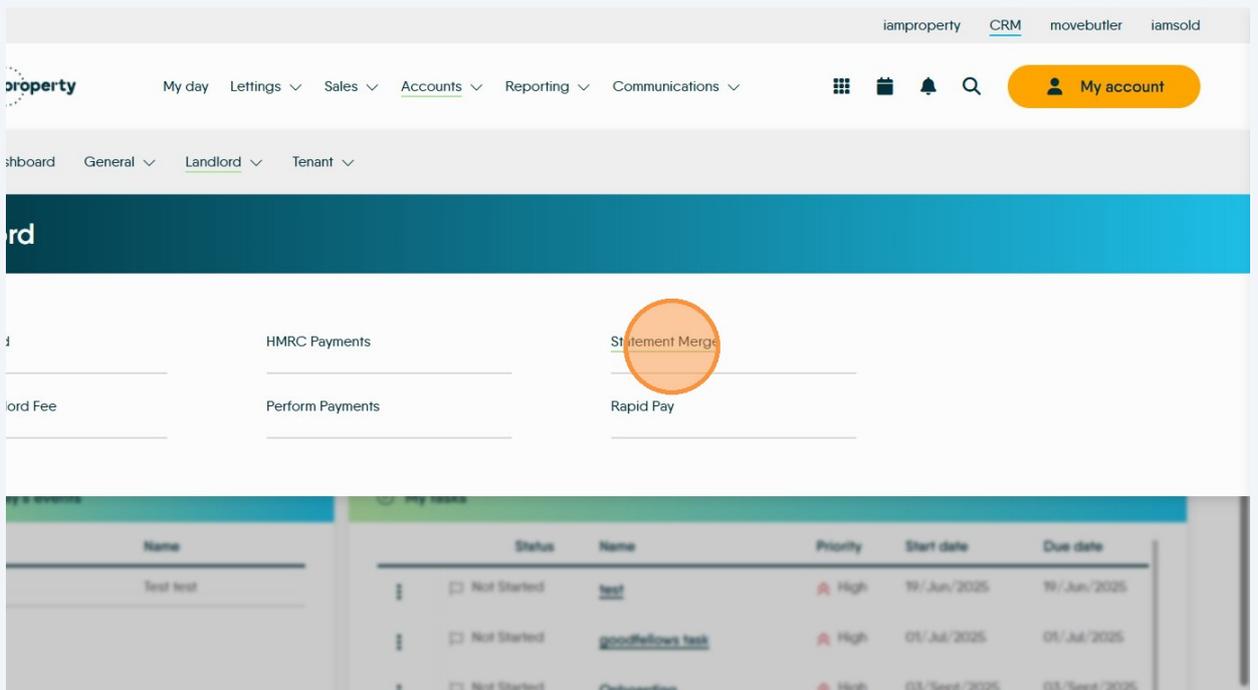
My tasks

Status	Name	Priority	Start date	Due date
☐ Not Started	test	High	19/Jun/2025	19/Jun/2025
☐ Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025
☐ Not Started	Onboarding	High	03/Sept/2025	03/Sept/2025

15 Click "Landlord"



16 Click "Statement Merge". The Statement Merge screen would generally be used after you have paid your landlords via 'Perform Payments' rather than the regular way to send a statement to a landlord.



17

The Statement Merge screen can be filtered to just show specific information. Click here.

iamproperty CRM movebutler

My day Lettings Sales Accounts Reporting Communications

Statement Merge - Property

Paid Today £ 0.00 Last 7 Days £ 38,040.00 Month to Date £ 38,040.00

Search 10

<input type="checkbox"/>	Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	Status
<input type="checkbox"/>	Arthur Morgan	63 Woodland Road, Darli...	12/11/2025	12/11/2025	£ 11,616.00	Email	No
<input type="checkbox"/>	Arthur Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	No
<input type="checkbox"/>	Margaret Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	No
<input type="checkbox"/>	Margaret Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	No
<input type="checkbox"/>	Arthur Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	No
<input type="checkbox"/>	Pamela Green	712 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 814.00	Email	Gr
<input type="checkbox"/>	Adrian Green	712 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 814.00	Email	No
<input type="checkbox"/>	Pamela Green	7278 Pelaw Crescent, Ch...	12/11/2025	12/11/2025	£ 500.00	Email	Gr
<input type="checkbox"/>	Pamela Green	92 Pelaw Crescent, Ches...	12/11/2025	12/11/2025	£ 3,000.00	Email	Gr
<input type="checkbox"/>	Pamela Green	87 Pelaw Crescent, Ches...	12/11/2025	12/11/2025	£ 4,400.00	Email	Gr

18

Click "**Record Type**" from the drop down menu select the option you are filtering by, in this case probably Landlord. Click "**Landlord**"

Filter X

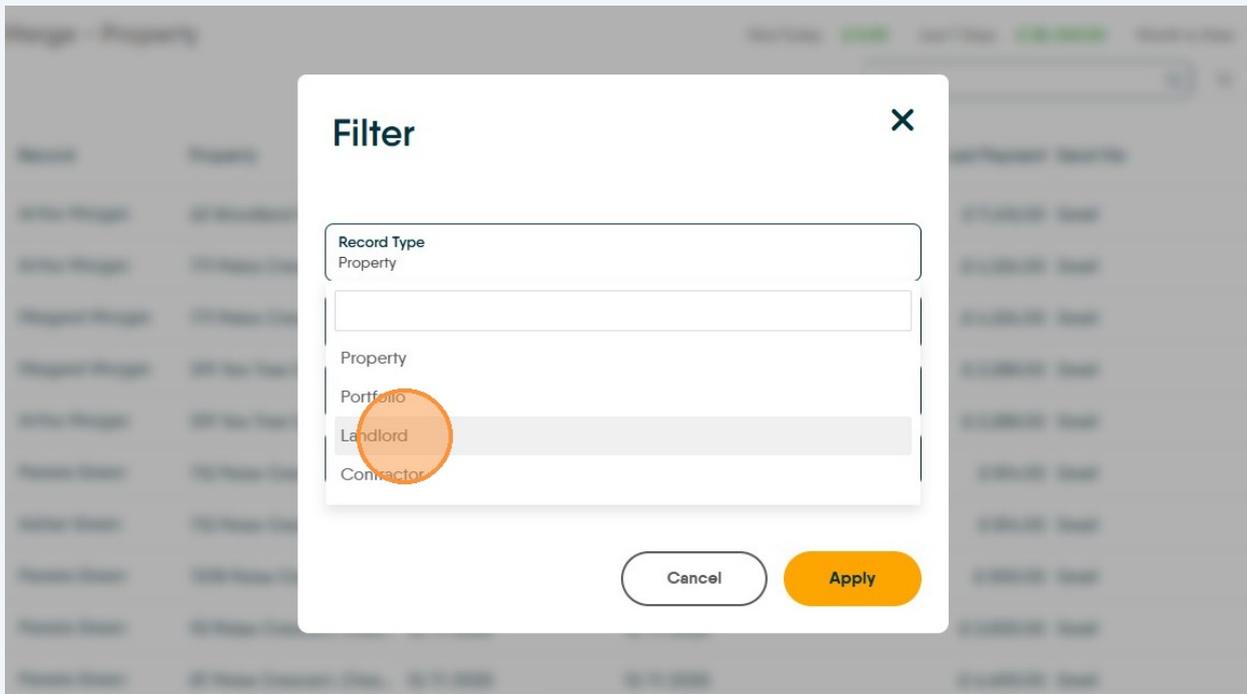
Record Type
Property

Date Paid
All

Date Added
All

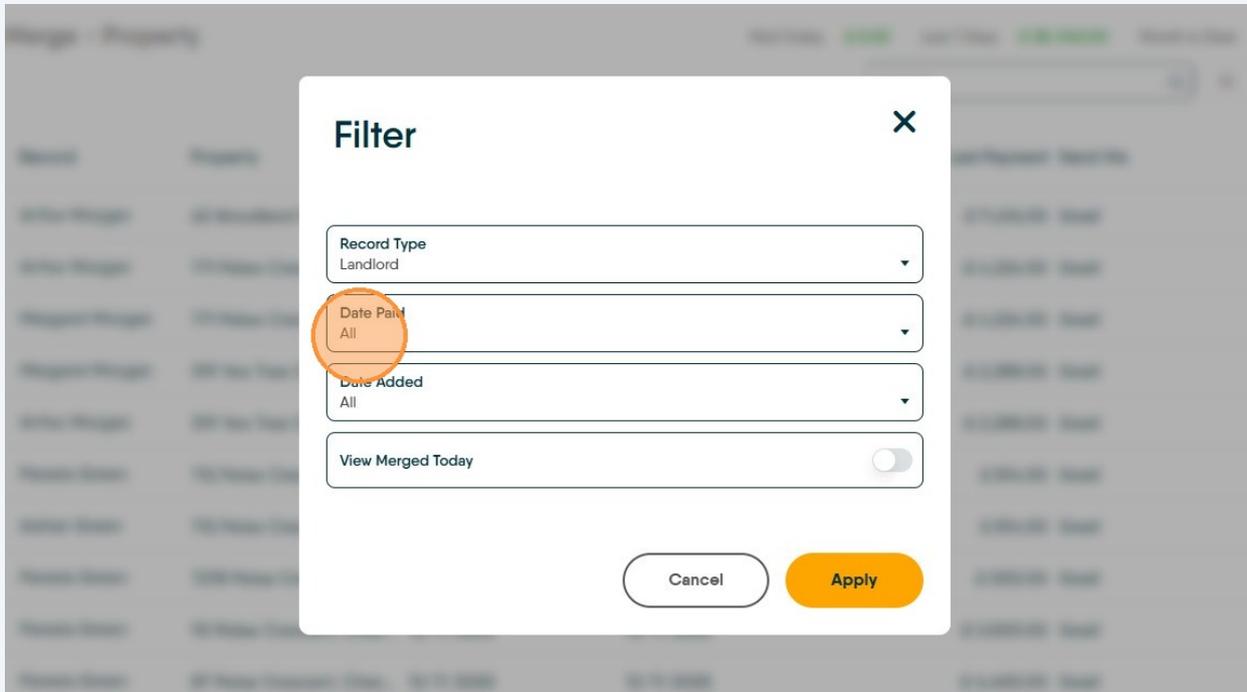
View Merged Today

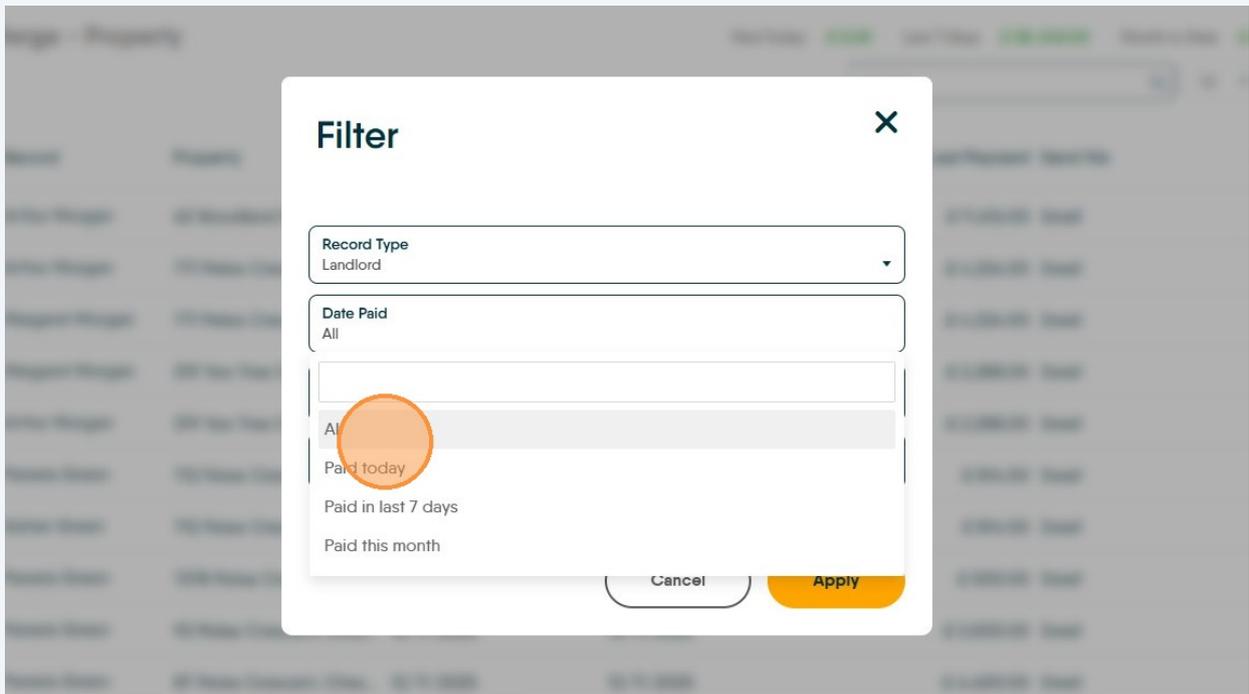
Cancel Apply



19

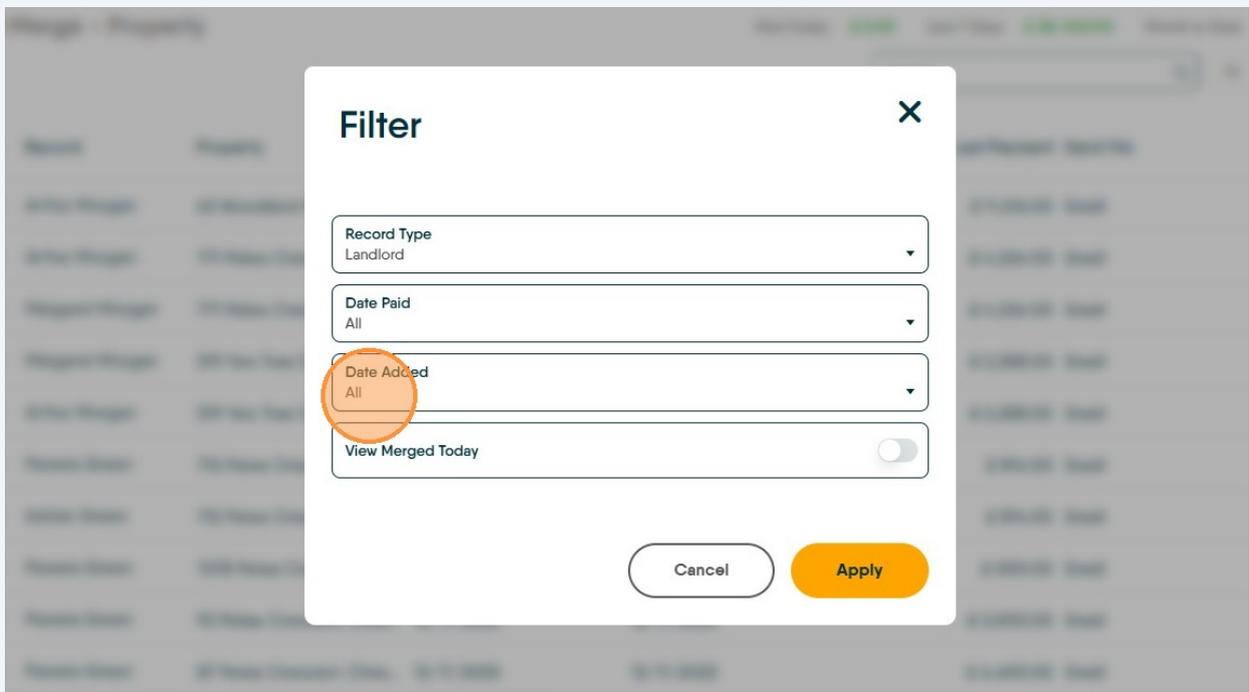
Click "**Date Paid**" to filter records by the last time they were paid. Select from the drop down menu.
Click "All"

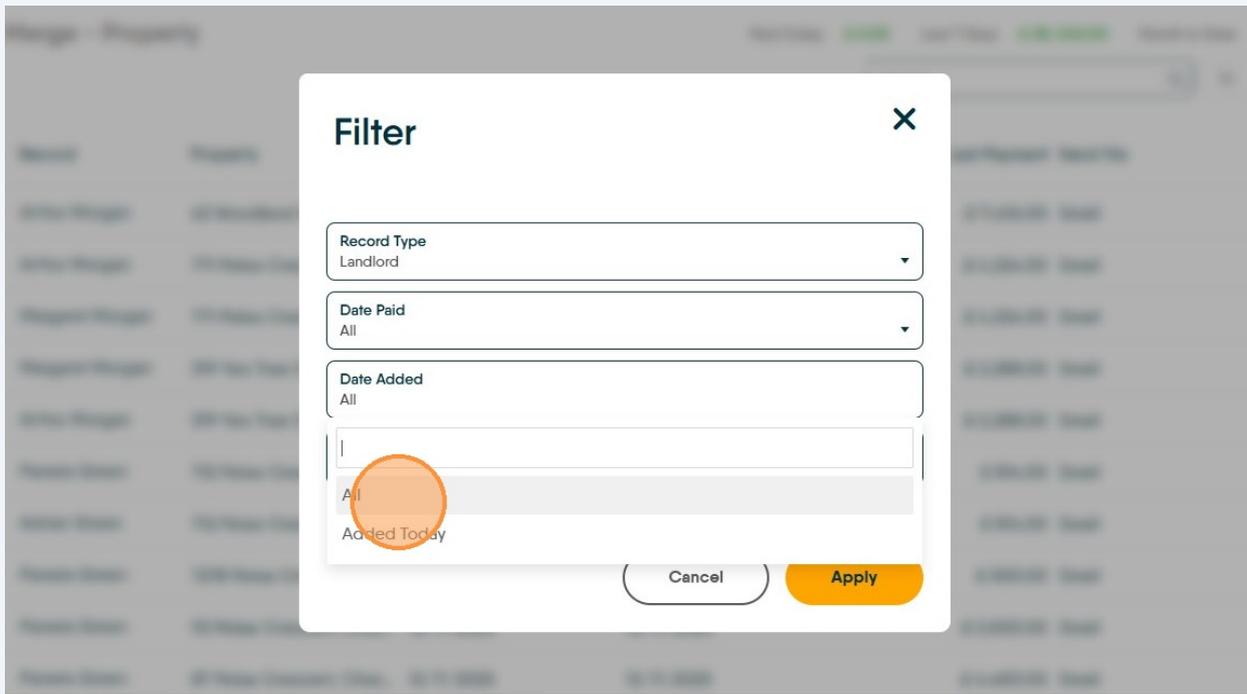




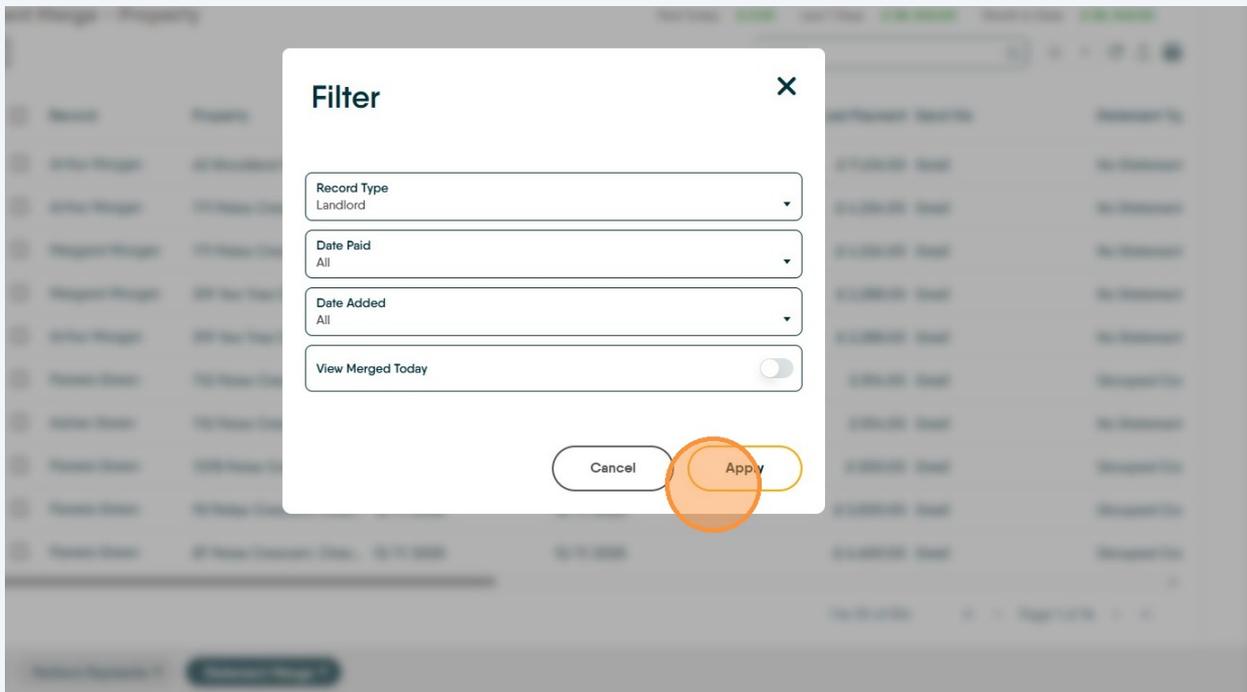
20

Click "**Date Added**" and select from the drop down menu
Click "All"





21 Click "Apply"



22

In this scenario we selected 'Landlord' as the filter. Select the Landlord you are sending the statement to.

Statement Merge - Landlord

Paid Today £ 0.00 Last 7 Days £ 17,468.00 Month to Date £ 17,468.00

Record	Last Payment Date	Date Added	Last Payment	Send Via	Statement Type	Em
<input type="checkbox"/>	Adrian Green	12/11/2025	£ 814.00	Email	No Statement	zaq
<input type="checkbox"/>	Alfie Martin	25/06/2025	£ 1,056.00	Email	No Statement	zaq
<input checked="" type="checkbox"/>	Arthur Morgan	12/11/2025	£ 11,616.00	Email	No Statement	zaq
<input type="checkbox"/>	Brooke Morgan		£ 0.00	Email	No Statement	zaq
<input type="checkbox"/>	Carey Hipwell		£ 0.00	Email	No Statement	zaq
<input type="checkbox"/>	David Morgan	31/07/2025	£ 350.00	Email	No Statement	da
<input type="checkbox"/>	David Morgan		£ 0.00	Email	No Statement	da
<input type="checkbox"/>	David Morgan	08/01/2025	£ 832.00	Email	No Statement	da
<input type="checkbox"/>	David Morgan		£ 0.00	Email	No Statement	da
<input type="checkbox"/>	David Morgan		£ 0.00	Email	No Statement	da

23

Click the "Merge" icon.

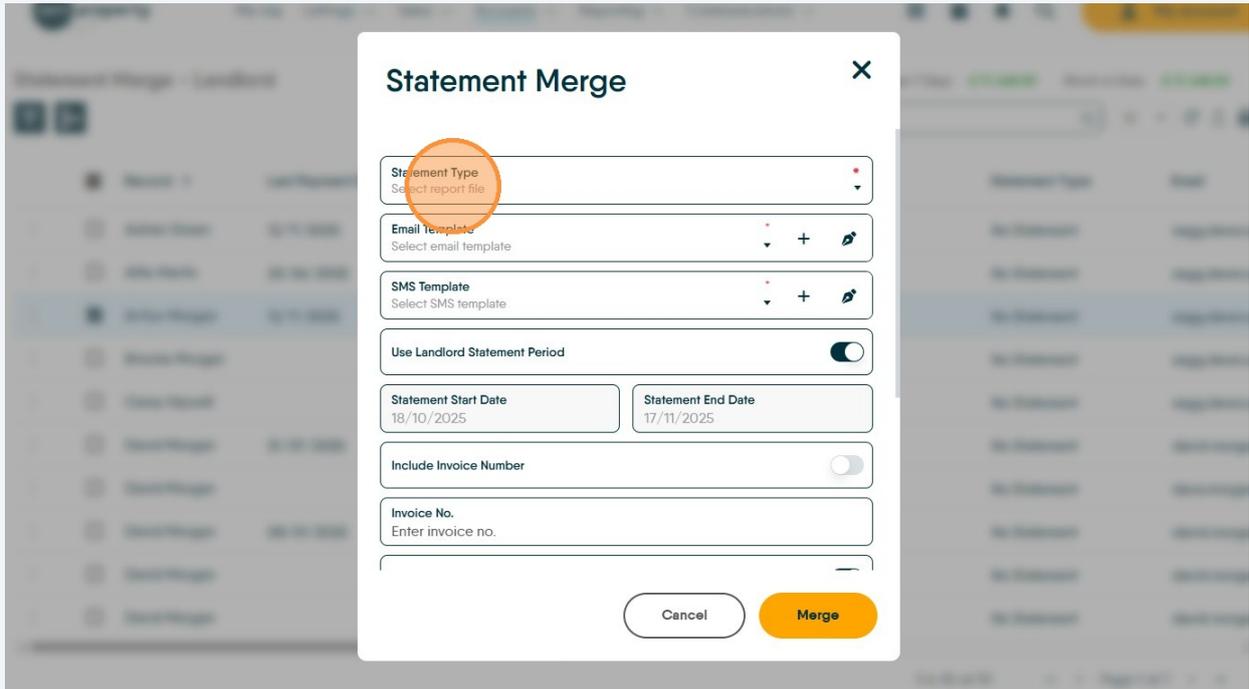
Statement Merge - Landlord

Paid Today £ 0.00 Last 7 Days £ 17,468.00 Month to Date £ 17,468.00

Record	Last Payment Date	Date Added	Last Payment	Send Via	Statement Type	Em
<input type="checkbox"/>	Adrian Green	12/11/2025	£ 814.00	Email	No Statement	zaq
<input type="checkbox"/>	Alfie Martin	25/06/2025	£ 1,056.00	Email	No Statement	zaq
<input checked="" type="checkbox"/>	Arthur Morgan	12/11/2025	£ 11,616.00	Email	No Statement	zaq
<input type="checkbox"/>	Brooke Morgan		£ 0.00	Email	No Statement	zaq
<input type="checkbox"/>	Carey Hipwell		£ 0.00	Email	No Statement	zaq
<input type="checkbox"/>	David Morgan	31/07/2025	£ 350.00	Email	No Statement	da
<input type="checkbox"/>	David Morgan		£ 0.00	Email	No Statement	da
<input type="checkbox"/>	David Morgan	08/01/2025	£ 832.00	Email	No Statement	da
<input type="checkbox"/>	David Morgan		£ 0.00	Email	No Statement	da
<input type="checkbox"/>	David Morgan		£ 0.00	Email	No Statement	da

24

Click "**Statement Type**" and from the drop down menu select the type of statement you are sending to your landlord.



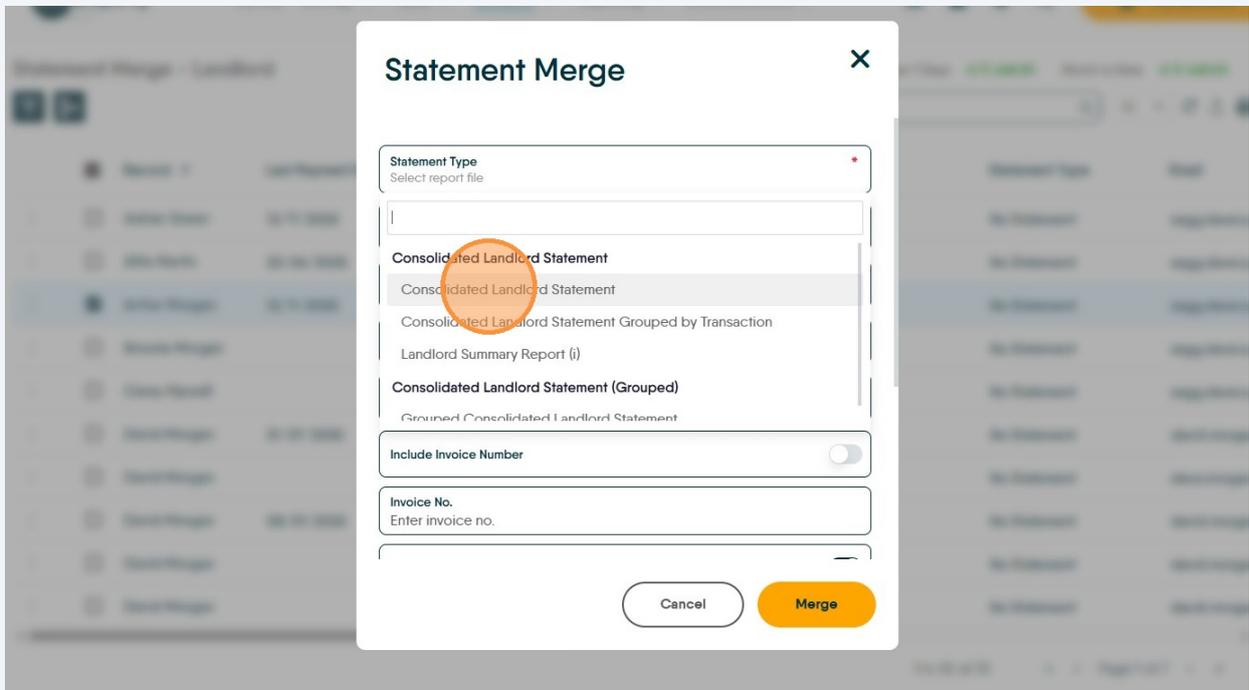
The screenshot shows a 'Statement Merge' dialog box with the following fields and options:

- Statement Type:** A dropdown menu with the text 'Select report file'. An orange circle highlights this field.
- Email Template:** A dropdown menu with the text 'Select email template'.
- SMS Template:** A dropdown menu with the text 'Select SMS template'.
- Use Landlord Statement Period:** A toggle switch that is currently turned on.
- Statement Start Date:** A date field containing '18/10/2025'.
- Statement End Date:** A date field containing '17/11/2025'.
- Include Invoice Number:** A toggle switch that is currently turned off.
- Invoice No.:** A text input field with the placeholder text 'Enter invoice no.'.

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

25

Click "**Consolidated Landlord Statement**"



The screenshot shows the 'Statement Merge' dialog box with the 'Statement Type' dropdown menu open. The options in the menu are:

- Consolidated Landlord Statement (highlighted with an orange circle)
- Consolidated Landlord Statement Grouped by Transaction
- Landlord Summary Report (i)
- Consolidated Landlord Statement (Grouped)
- Grouped Consolidated Landlord Statement

The other fields and buttons in the dialog are the same as in the previous screenshot.

26

Click **"Email template"** select the email template you have previously created from the drop down list. Otherwise, create your new template by clicking the '+' or edit an existing template by clicking on the 'pen' icon (highlighted.)

The screenshot shows a 'Statement Merge' dialog box with the following fields and options:

- Statement Type:** Consolidated Landlord Statement
- Email template:** Select email template. A '+' icon and a pen icon are highlighted with an orange box.
- SMS Template:** Select SMS template. A '+' icon and a pen icon are visible.
- Use Landlord Statement Period:** A toggle switch is turned on.
- Statement Start Date:** 18/10/2025
- Statement End Date:** 17/11/2025
- Include Invoice Number:** A toggle switch is turned off.
- Invoice No.:** Enter invoice no.

Buttons at the bottom: Cancel (white), Merge (orange).

27

Click **"Monthly Statement"**

The screenshot shows the 'Statement Merge' dialog box with the 'Email Template' dropdown menu open. The 'Monthly Statement' option is highlighted with an orange circle. The dropdown list includes the following options:

- test
- Portfolio Payment
- statement
- Statement
- Monthly Statement

The other fields and buttons in the dialog are the same as in the previous screenshot.

28

Click here and turn **off** the 'Use Landlord Statement Period' option this allows you to set your own end date.

The screenshot shows a 'Statement Merge' dialog box with the following fields and controls:

- Statement Type:** Consolidated Landlord Statement
- Email Template:** Monthly Statement
- SMS Template:** Select SMS template
- Use Landlord Statement Period:** A toggle switch that is currently turned off (indicated by an orange circle).
- Statement Start Date:** 18/10/2025
- Statement End Date:** 17/11/2025
- Include Invoice Number:** A toggle switch that is currently turned off.
- Invoice No.:** Enter invoice no.
- Buttons:** Cancel and Merge.

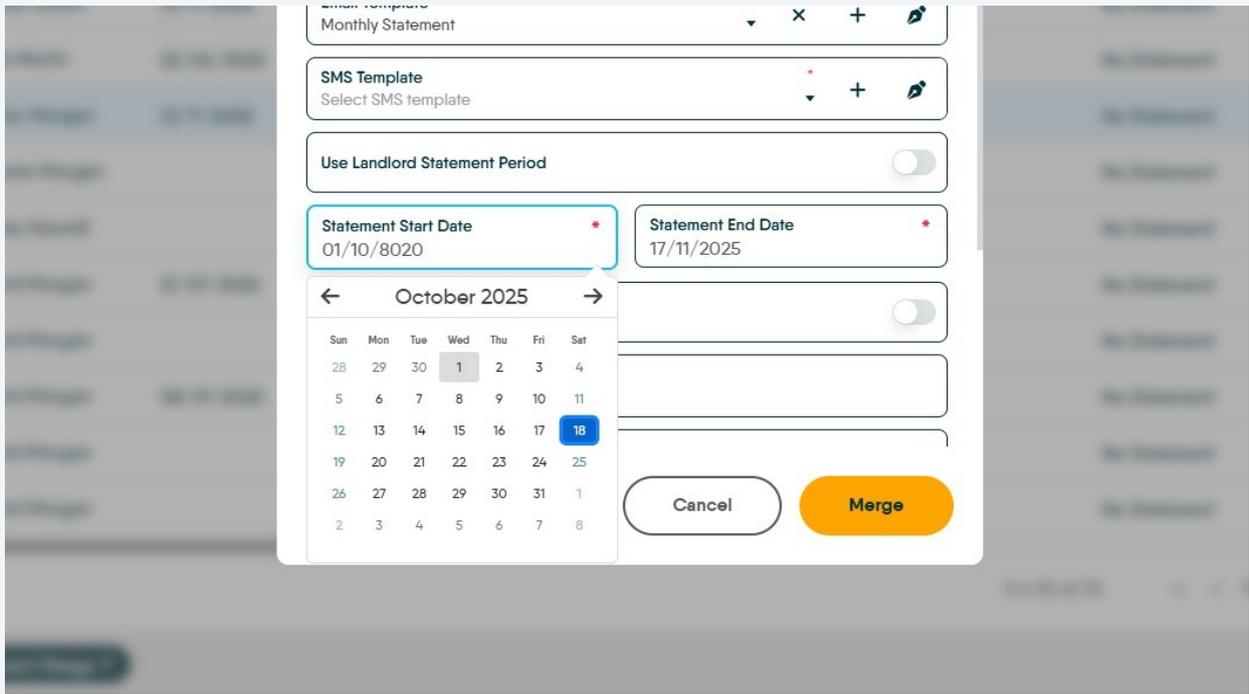
29

Click the "**Statement Start Date**" field use the calendar options to select the start date for the statement.

The screenshot shows the same 'Statement Merge' dialog box as in the previous image, but with the 'Statement Start Date' field highlighted by an orange circle. The field contains the date 18/10/2025. The 'Use Landlord Statement Period' toggle is now turned on.

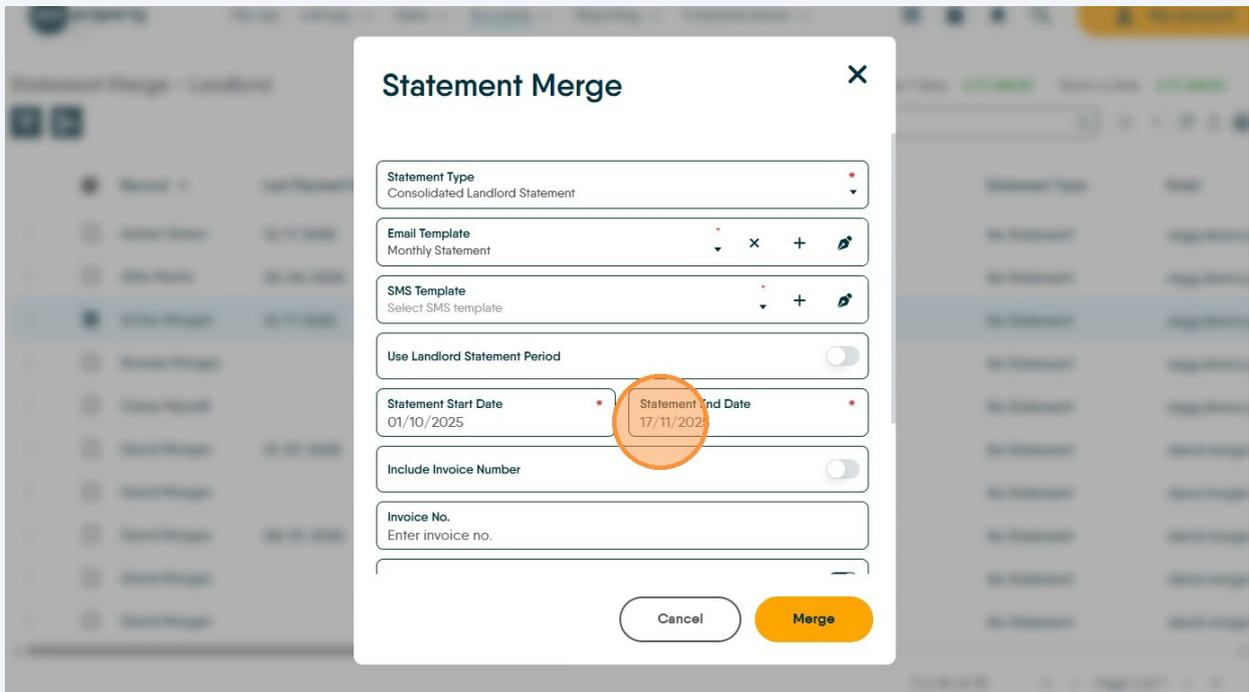
The fields and controls are:

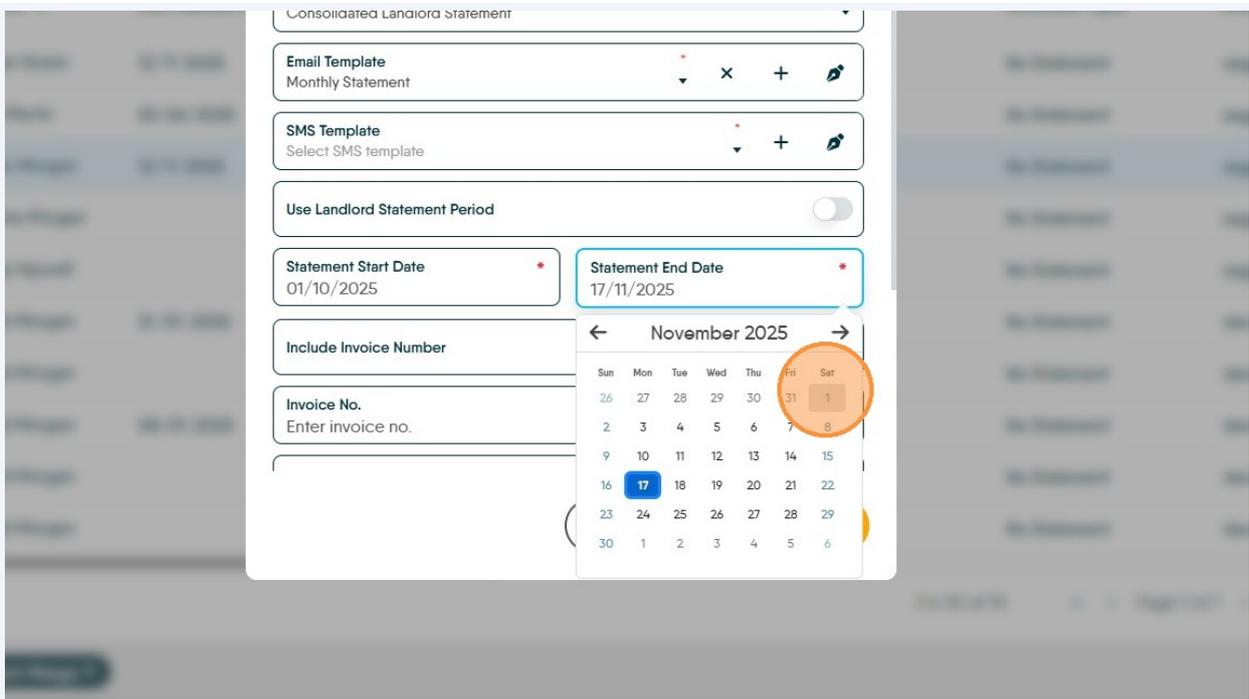
- Statement Type:** Consolidated Landlord Statement
- Email Template:** Monthly Statement
- SMS Template:** Select SMS template
- Use Landlord Statement Period:** A toggle switch that is currently turned on.
- Statement Start Date:** 18/10/2025 (highlighted with an orange circle)
- Statement End Date:** 17/11/2025
- Include Invoice Number:** A toggle switch that is currently turned off.
- Invoice No.:** Enter invoice no.
- Buttons:** Cancel and Merge.



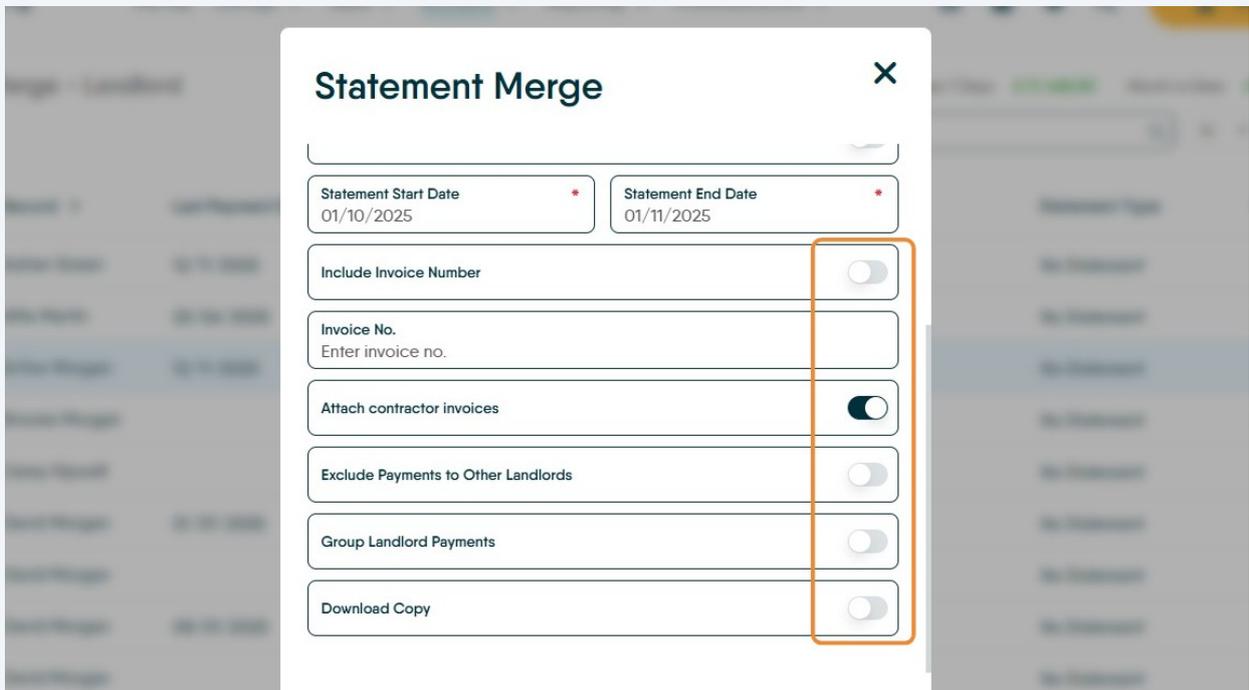
30

Click the "**Statement End Date**" field and set the end date for the statement you are creating. In this case it will be 30 days.

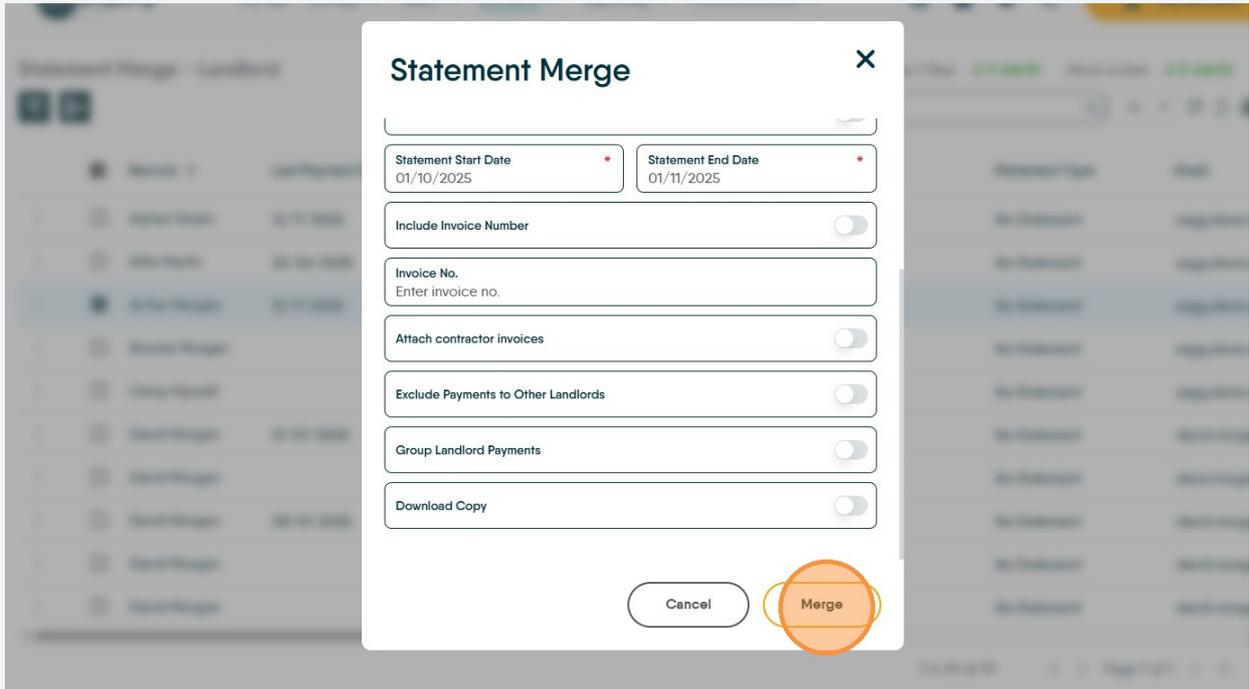




31 If required, turn off any other options that you have set.



32 Click **"Merge"**



33 This will send all the selected landlords their Statements based on the date ranges selected.