

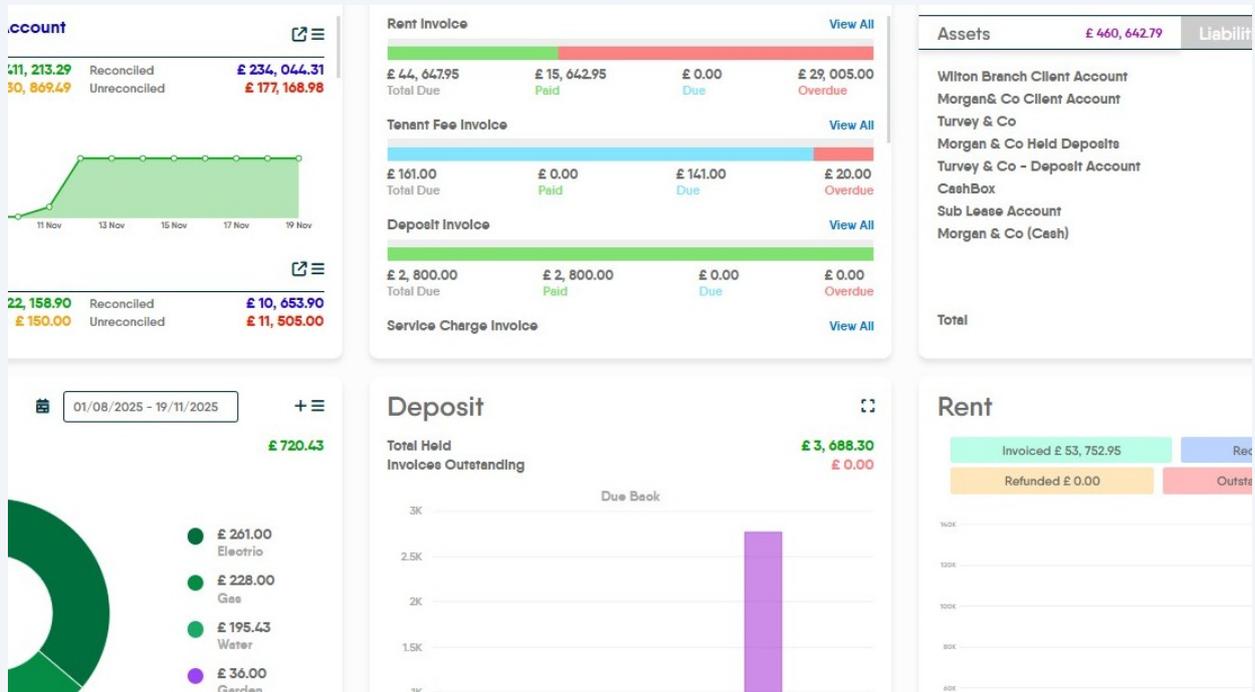
Using Statement Merge to Generate Landlord Statements



This guide provides a step-by-step process for generating landlord statements using the Statement Merge feature.

By following the outlined steps, users can efficiently create and send customised statements, ensuring accurate communication with landlords.

1 Navigate to <https://crm.iamproperty.com/Dashboards/Accounts>



2 Click "Accounts"

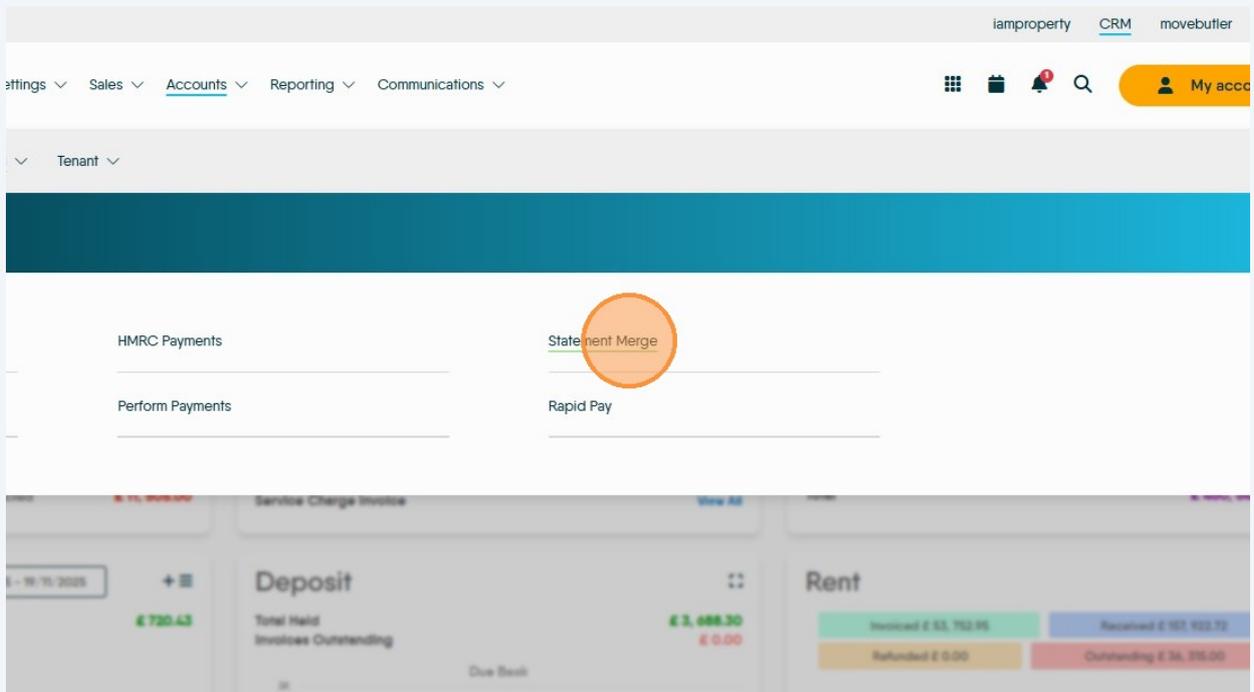
The screenshot shows the 'Accounts' dashboard in the iam property system. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts' (circled in orange), 'Reporting', and 'Communications'. The main content area is divided into several sections:

- Accounts:** Lists two client accounts:
 - Morgan & Co Client Account:** 01-02-03 01234567. Balance: £ 411, 213.29 (Reconciled) / £ 234, 044.31 (Unreconciled). Unallocated Funds: £ 30, 809.49.
 - Turvey & Co:** 24-52-19 24521960. Balance: £ 22, 158.90 (Reconciled) / £ 10, 653.90 (Unreconciled). Unallocated Funds: £ 150.00.
- Invoices:** Shows a summary for the period 22/10/2025 - 19/11/2025. Includes Rent Invoice, Tenant Fee Invoice, Deposit Invoice, and Service Charge Invoice, each with a 'View All' link.
- Expenses:** Total for the period 01/08/2025 - 19/11/2025 is £ 720.43.
- Deposit:** Total Held Invoices Outstanding is £ 3, 688.30.
- Rent:** Total is £ 0.00.
- Assets:** Lists various assets including Wilton Bran, Morgan & Co, Turvey & Co, Morgan & Co, Turvey & Co, CashBox, Sub Lease / Morgan & Co, and Total.

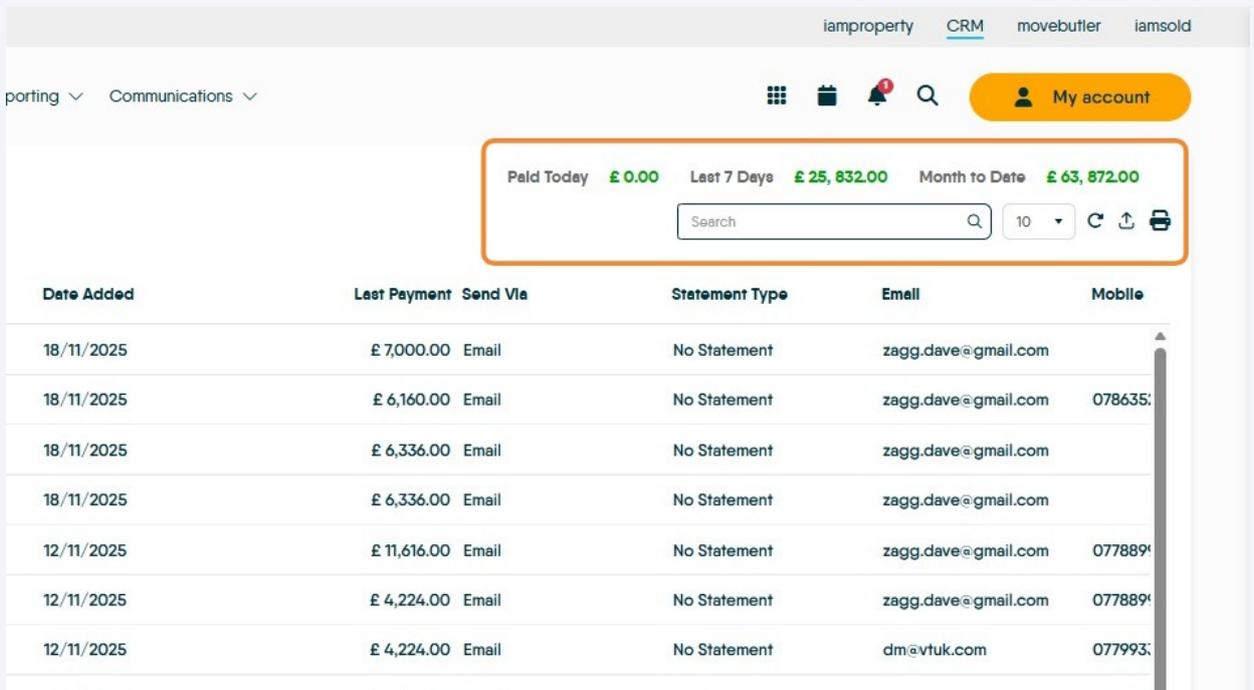
3 Click "Landlord"

This screenshot is identical to the previous one, but with the 'Landlord' filter selected in the 'Accounts dashboard' section. The 'Landlord' option is circled in orange. The dashboard content remains the same, showing the same client accounts, invoices, expenses, deposit, and rent information.

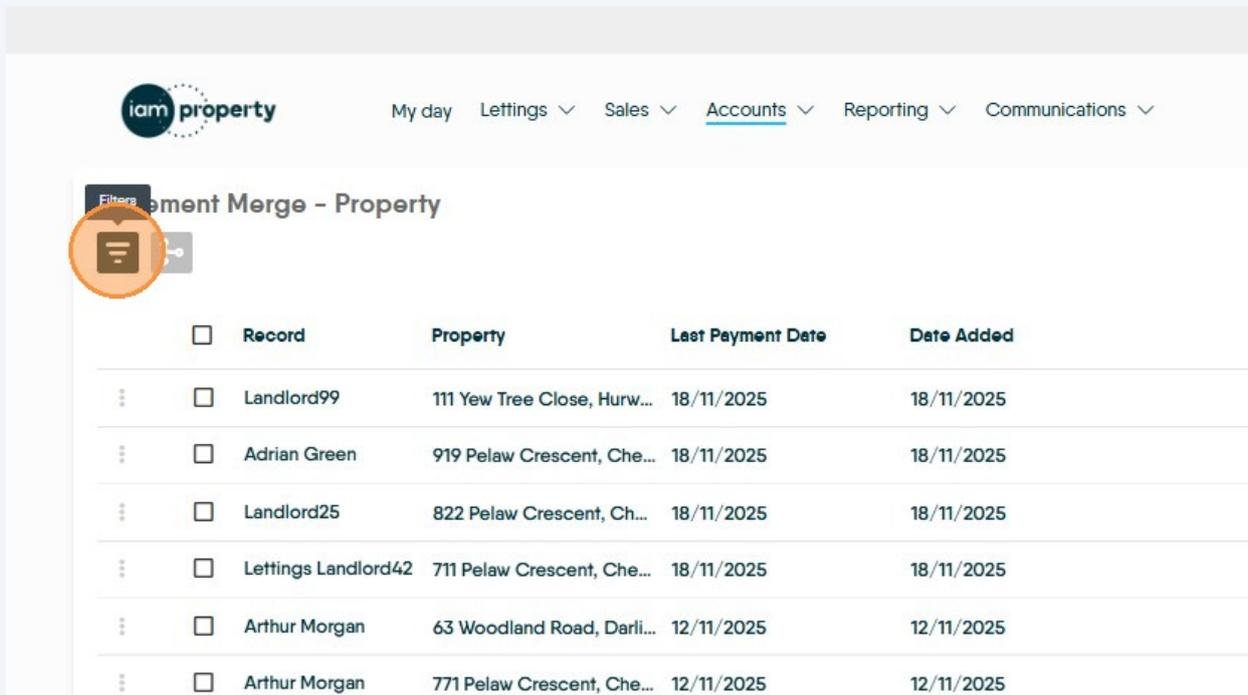
4 Click "Statement Merge"



5 At the top of this screen there is information on how much has been paid out 'Today', in the 'Last 7 Days' and 'Month to Date'. There is also the option to export the data in this screen to a .csv file or print to pdf.



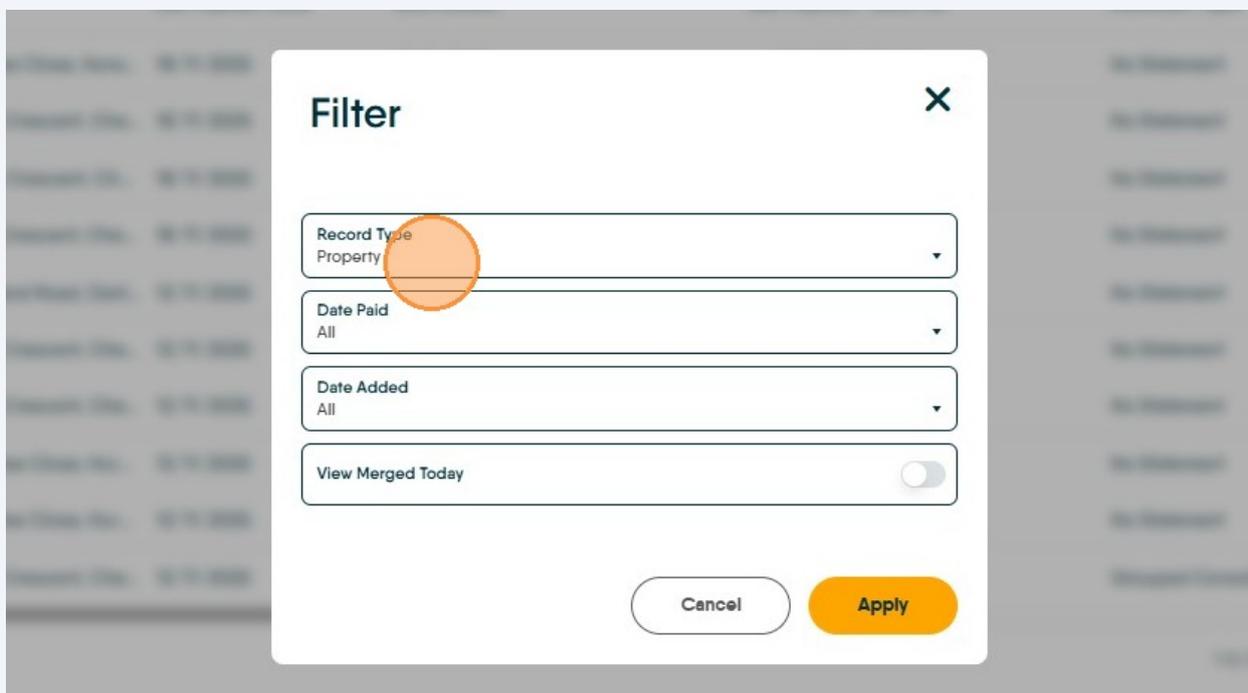
6 Click **"Filter"** to filter the list, there are a number of options



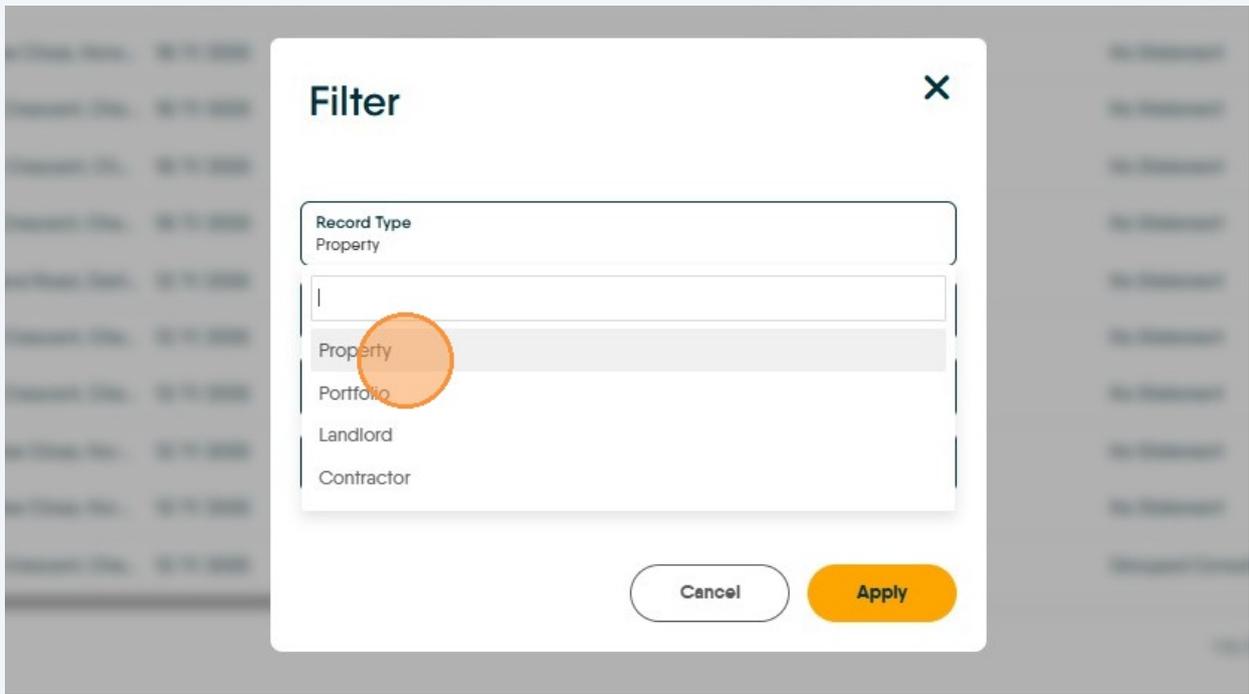
The screenshot shows the 'iam property' dashboard. At the top, there are navigation tabs: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this is a section titled 'Payment Merge - Property'. A filter icon (three horizontal lines) is circled in orange. Below the icon is a table with the following columns: 'Record', 'Property', 'Last Payment Date', and 'Date Added'. The table contains seven rows of data.

<input type="checkbox"/>	Record	Property	Last Payment Date	Date Added
<input type="checkbox"/>	Landlord99	111 Yew Tree Close, Hurw...	18/11/2025	18/11/2025
<input type="checkbox"/>	Adrian Green	919 Pelaw Crescent, Che...	18/11/2025	18/11/2025
<input type="checkbox"/>	Landlord25	822 Pelaw Crescent, Ch...	18/11/2025	18/11/2025
<input type="checkbox"/>	Lettings Landlord42	711 Pelaw Crescent, Che...	18/11/2025	18/11/2025
<input type="checkbox"/>	Arthur Morgan	63 Woodland Road, Darli...	12/11/2025	12/11/2025
<input type="checkbox"/>	Arthur Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025

7 Click **"Record Type"** There is the options of "Property", "Portfolio", "Landlord" and "Contractor" selecting any of these will show only those records on the screen.

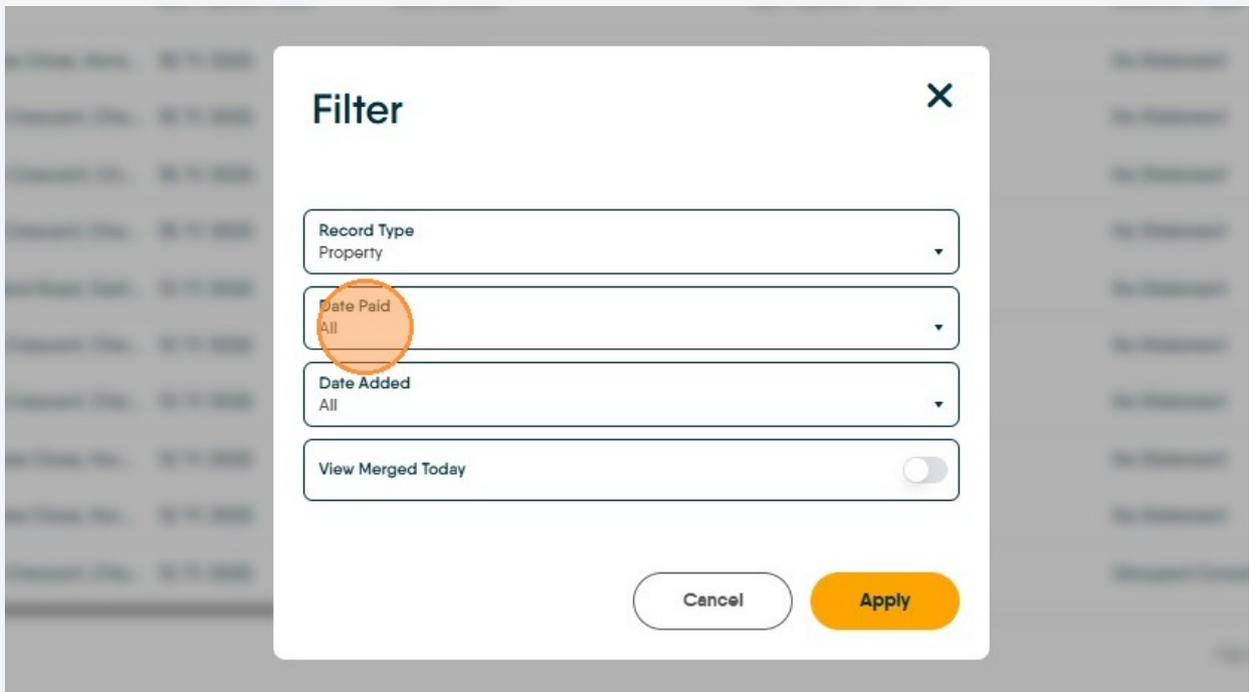


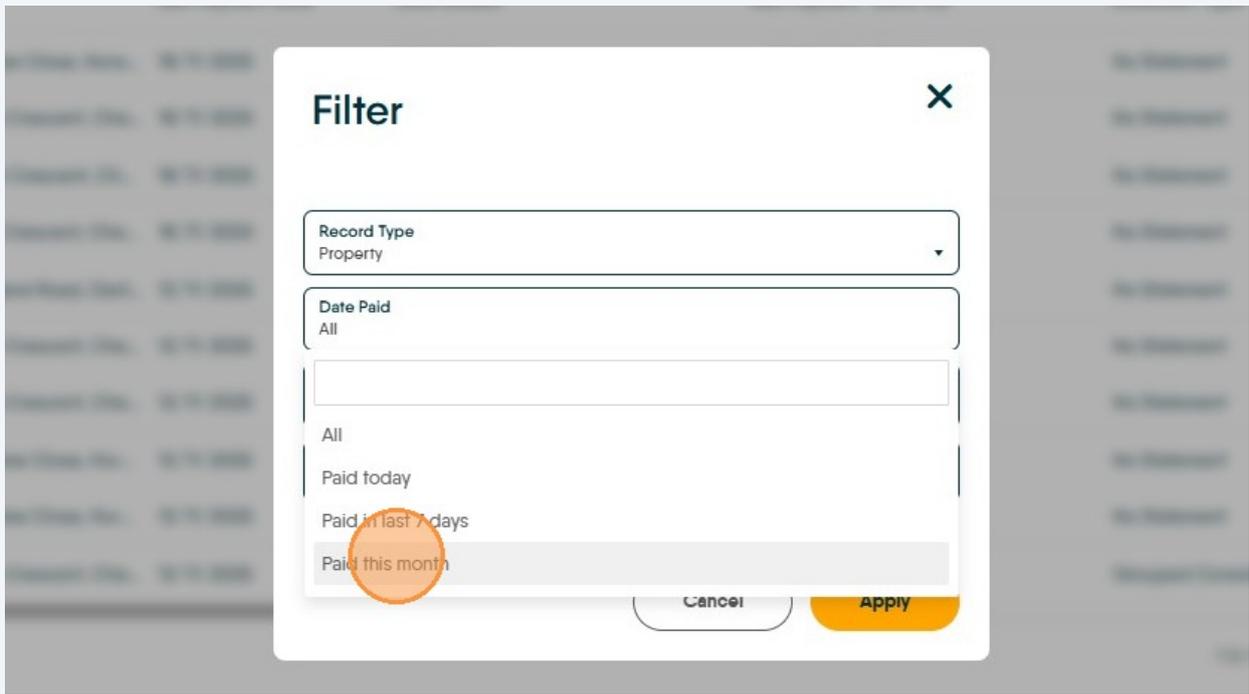
The screenshot shows a 'Filter' dialog box with a close button (X) in the top right corner. The dialog contains four filter options: 'Record Type' (set to 'Property'), 'Date Paid' (set to 'All'), 'Date Added' (set to 'All'), and 'View Merged Today' (a toggle switch). The 'Record Type' dropdown is circled in orange. At the bottom of the dialog are 'Cancel' and 'Apply' buttons.



8

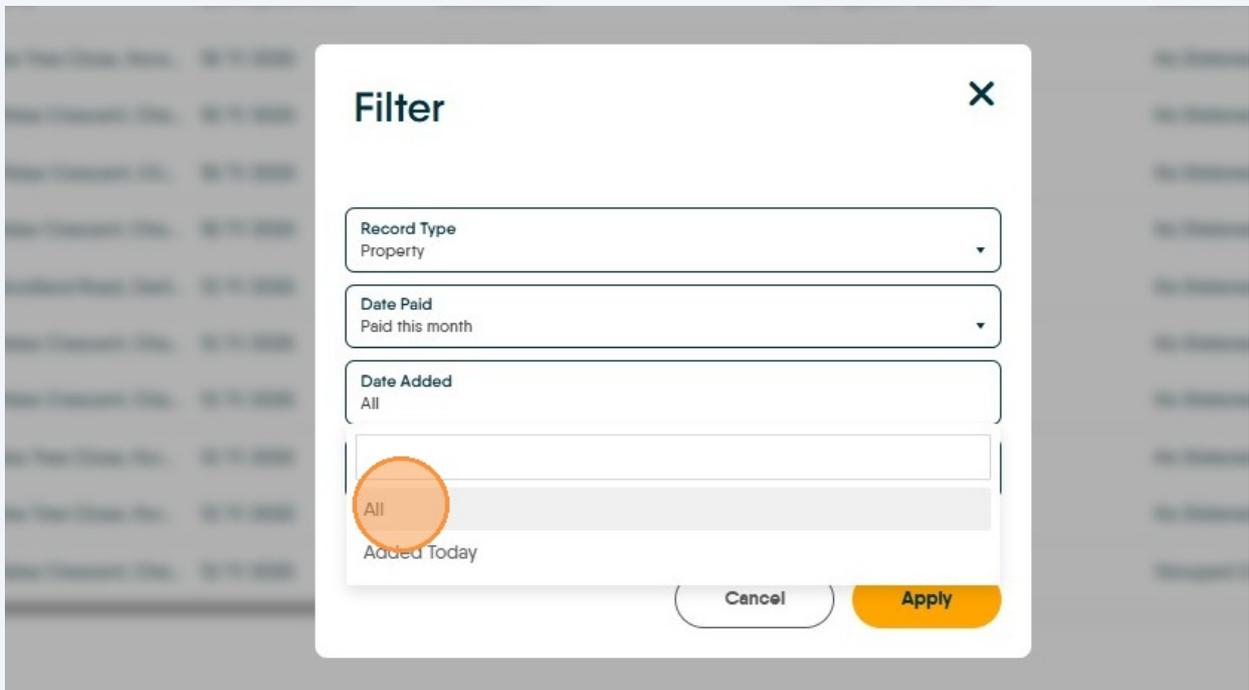
Click "**Date Paid**" you will have the option of "All", "Paid Today", "Paid in Last 7 Days" and "Paid this month".





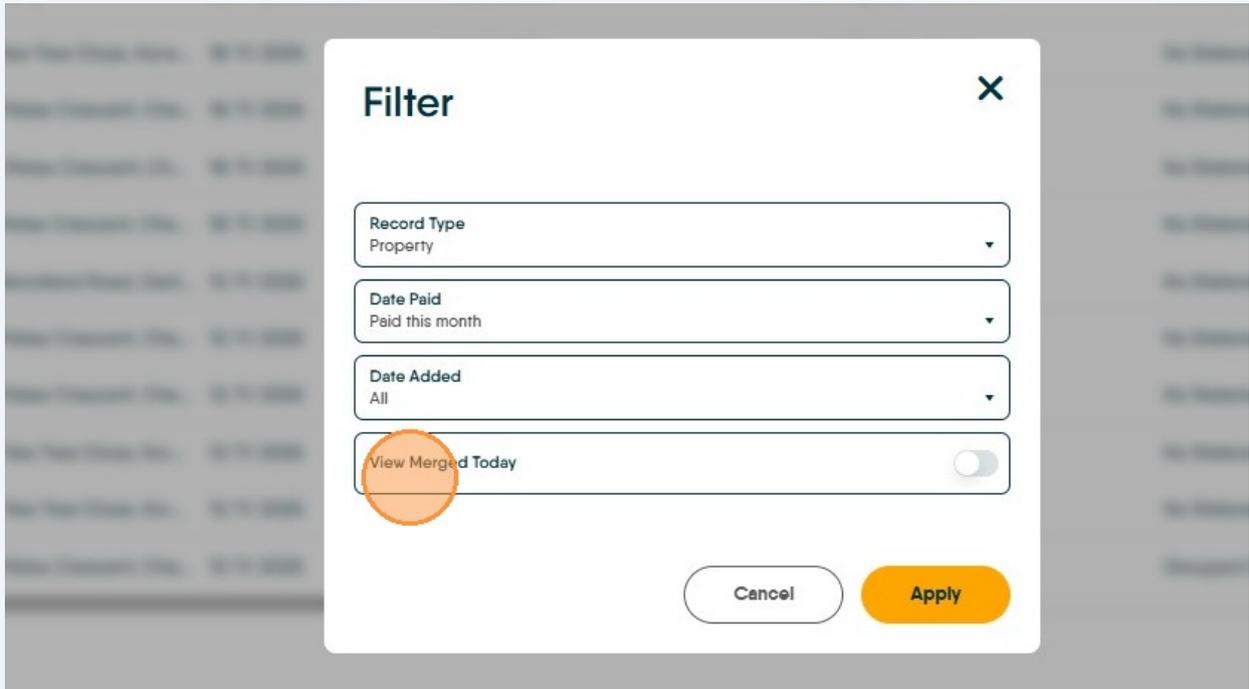
9 Click "**Date Added**" here there are 2 options "All" and "Added Today"

To be sure of not missing a opportunity to send a statement, we recommend "All" be selected and use the check boxes to control who a statement is sent to.



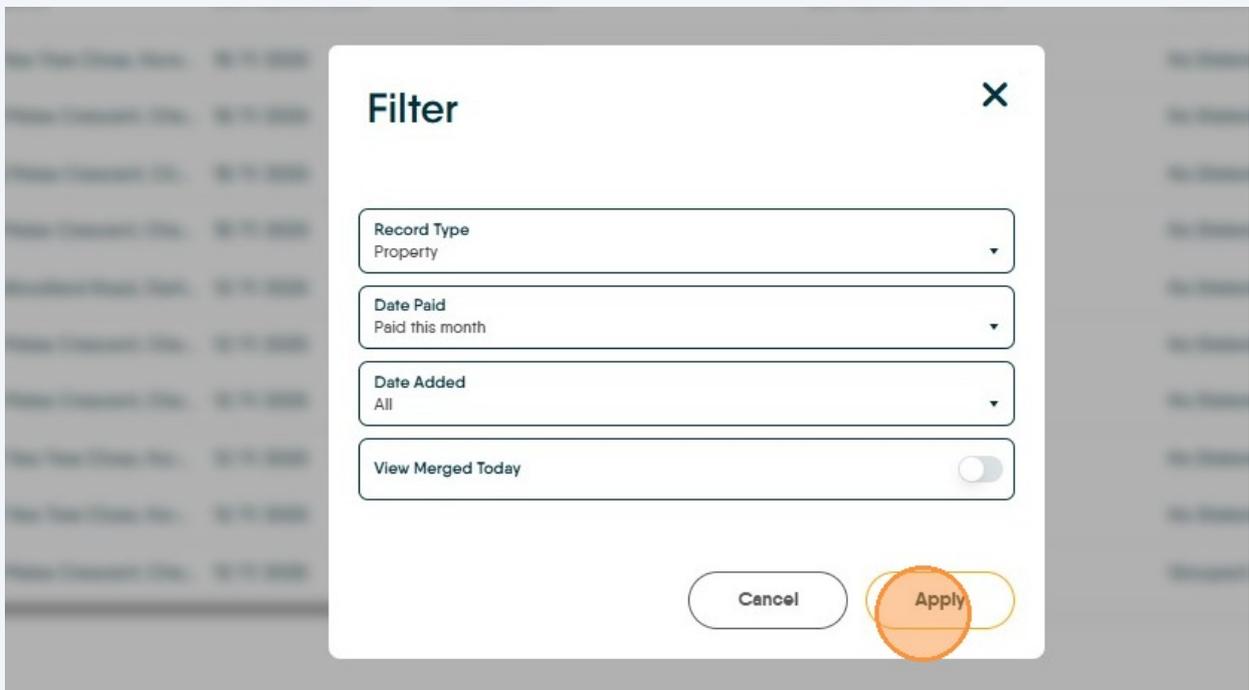
10

Click **"View Merged Today"** to only show records created on the day you are creating the Statements.



11

Click **"Apply"**



12

The **"Statement Merge"** screen shows all the information about the statements. If you sort the list by "Send Via" (click on the 'send via' header) it will be obvious which clients want a posted statement, email etc. "Statement Type" shows what type of statement a client has requested, from here you can sort your list and send the statements in batches depending on the client requirements.

Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	Statement Type	Email	Mobile
Landlord99	111 Yew Tree Close, Hurw...	18/11/2025	18/11/2025	£ 7,000.00	Email	No Statement	zagg.dave@gmail.com	
Adrian Green	919 Pelaw Crescent, Che...	18/11/2025	18/11/2025	£ 6,160.00	Email	No Statement	zagg.dave@gmail.com	078635
Landlord25	822 Pelaw Crescent, Ch...	18/11/2025	18/11/2025	£ 6,336.00	Email	No Statement	zagg.dave@gmail.com	
Lettings Landlord42	711 Pelaw Crescent, Che...	18/11/2025	18/11/2025	£ 6,336.00	Email	No Statement	zagg.dave@gmail.com	
Arthur Morgan	63 Woodland Road, Darl...	12/11/2025	12/11/2025	£ 11,616.00	Email	No Statement	zagg.dave@gmail.com	077889
Arthur Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	No Statement	zagg.dave@gmail.com	077889
Margaret Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	No Statement	dm@vtuk.com	077993
Margaret Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	No Statement	dm@vtuk.com	077993
Arthur Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	No Statement	zagg.dave@gmail.com	077889
Pamela Green	712 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 814.00	Email	Grouped Consolidated ...	zagg.dave@gmail.com	071232

13

"Statement Start" **"Statement End"** shows the date range the statement that is to be sent will cover and is the date of the last statement to today's date. **"Current Balance"** is also shown as is the date of the last Statement merge for that Landlord/Contractor

Address	Statement Start	Statement End	Current Balance	Statement No.	Last Statement Merge
	09/01/2025	19/11/2025	£ 0.00	2	08/01/2025
1111 Kingsway, Darlington	04/02/2025	19/11/2025	£ 0.00	3	03/02/2025
	20/10/2025	19/11/2025	£ 0.00	1	
	09/01/2025	19/11/2025	£ 0.00	2	08/01/2025
41 Barrett Road, Darling...	29/10/2025	19/11/2025	£ 1,660.00	58	28/10/2025
41 Barrett Road, Darling...	25/03/2025	19/11/2025	£ 1,152.00	3	24/03/2025
58 Elton Parade, Darling...	25/03/2025	19/11/2025	£ 1,152.00	3	24/03/2025
58 Elton Parade, Darling...	09/01/2025	19/11/2025	£ 3,900.00	3	08/01/2025
41 Barrett Road, Darling...	09/01/2025	19/11/2025	£ 3,900.00	3	08/01/2025
37 Barrett Road, Darling...	02/10/2025	19/11/2025	£ 0.00	34	01/10/2025

14

To send an individual statement merge. Click the 3-dot menu and select Email or SMS. Then follow the process shown [below](#).

The screenshot shows the 'iam property' dashboard with a navigation menu including 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area is titled 'Statement Merge - Property' and shows a table of records. A 3-dot menu is highlighted for the first record, with a sub-menu showing 'Email' and 'SMS' options.

<input type="checkbox"/>	Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	St
<input type="checkbox"/>	Landlord99	111 Yew Tree Close, Hur...	18/11/2025	18/11/2025	£ 7,000.00	Email	Nc
<input type="checkbox"/>	Adrian Green	919 Pelaw Crescent, Che...	18/11/2025	18/11/2025	£ 6,160.00	Email	Nc
<input type="checkbox"/>	Landlord25	822 Pelaw Crescent, Ch...	18/11/2025	18/11/2025	£ 6,336.00	Email	Nc
<input type="checkbox"/>	Lettings Landlord42	711 Pelaw Crescent, Che...	18/11/2025	18/11/2025	£ 6,336.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	63 Woodland Road, Darli...	12/11/2025	12/11/2025	£ 11,616.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	Nc
<input type="checkbox"/>	Margaret Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	Nc
<input type="checkbox"/>	Margaret Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	Nc
<input type="checkbox"/>	Pamela Green	712 Pelaw Crescent. Che...	12/11/2025	12/11/2025	£ 814.00	Email	Gr

15

Click here to select all of the records in the list.

The screenshot shows the same 'Statement Merge - Property' interface as above. The 'Select All' checkbox at the top left of the table is highlighted with an orange circle.

<input type="checkbox"/>	Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	St
<input type="checkbox"/>	Landlord99	111 Yew Tree Close, Hur...	18/11/2025	18/11/2025	£ 7,000.00	Email	Nc
<input type="checkbox"/>	Adrian Green	919 Pelaw Crescent, Che...	18/11/2025	18/11/2025	£ 6,160.00	Email	Nc
<input type="checkbox"/>	Landlord25	822 Pelaw Crescent, Ch...	18/11/2025	18/11/2025	£ 6,336.00	Email	Nc
<input type="checkbox"/>	Lettings Landlord42	711 Pelaw Crescent, Che...	18/11/2025	18/11/2025	£ 6,336.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	63 Woodland Road, Darli...	12/11/2025	12/11/2025	£ 11,616.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	Nc
<input type="checkbox"/>	Margaret Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	Nc
<input type="checkbox"/>	Margaret Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	Nc
<input type="checkbox"/>	Pamela Green	712 Pelaw Crescent. Che...	12/11/2025	12/11/2025	£ 814.00	Email	Gr

16

Click this checkbox to individually select (or deselect) records from the statement merge.

The screenshot shows the 'iam property' dashboard with a navigation menu including 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area is titled 'Statement Merge - Property' and includes a 'Paid Today £ 0.00' indicator. A table lists various records with columns for 'Record', 'Property', 'Last Payment Date', 'Date Added', 'Last Payment', 'Send Via', and 'St'. The first three rows are highlighted in blue, and their checkboxes are circled in orange.

Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	St	
<input checked="" type="checkbox"/>	Landlord99	111 Yew Tree Close, Hurw...	18/11/2025	18/11/2025	£ 7,000.00	Email	Nc
<input checked="" type="checkbox"/>	Adrian Green	919 Pelaw Crescent, Che...	18/11/2025	18/11/2025	£ 6,160.00	Email	Nc
<input checked="" type="checkbox"/>	Landlord25	822 Pelaw Crescent, Ch...	18/11/2025	18/11/2025	£ 6,336.00	Email	Nc
<input type="checkbox"/>	Lettings Landlord42	711 Pelaw Crescent, Che...	18/11/2025	18/11/2025	£ 6,336.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	63 Woodland Road, Darli...	12/11/2025	12/11/2025	£ 11,616.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	Nc
<input type="checkbox"/>	Margaret Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	Nc
<input type="checkbox"/>	Margaret Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	Nc
<input type="checkbox"/>	Pamela Green	712 Pelaw Crescent. Che...	12/11/2025	12/11/2025	£ 814.00	Email	Gr

17

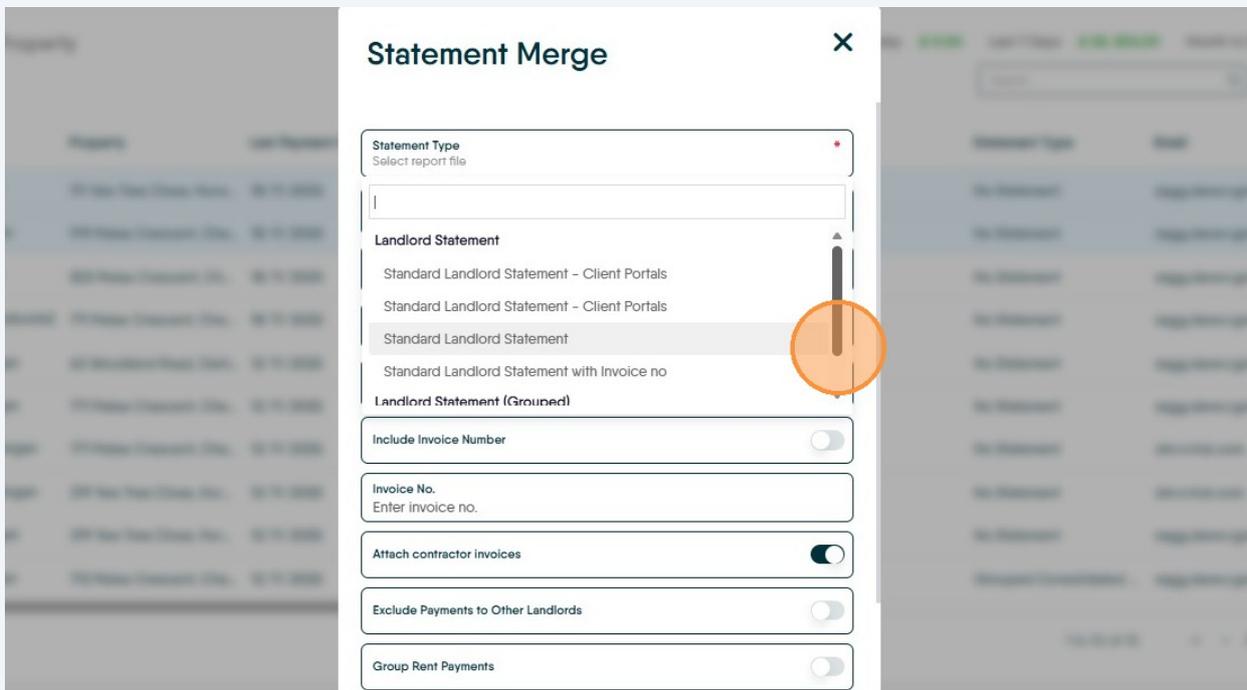
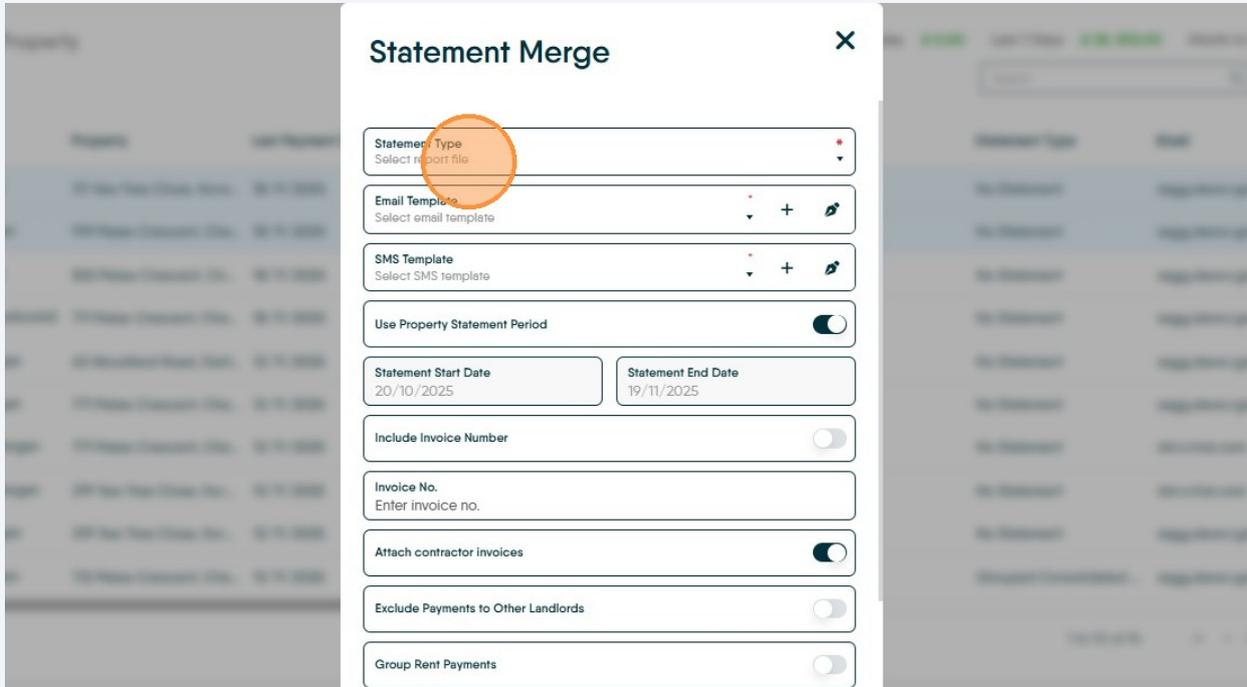
Click the "Merge".

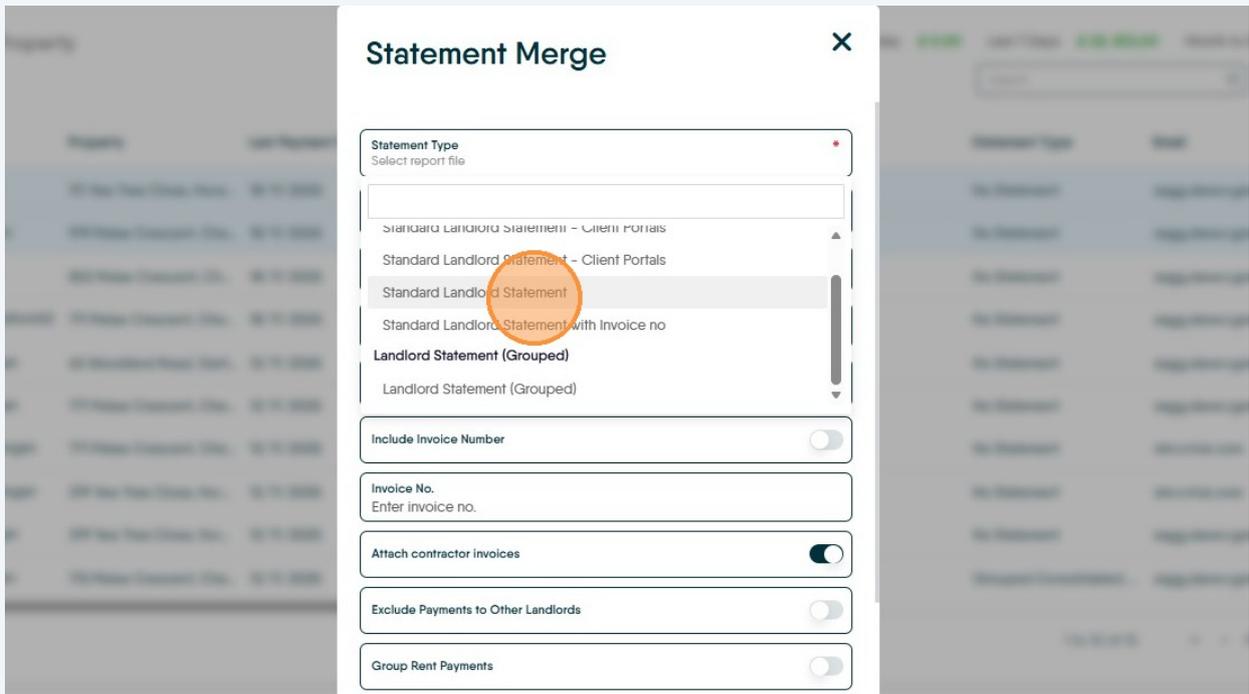
This screenshot is identical to the one above, but with the 'Merge' button (represented by a circular icon with a double arrow) highlighted in orange. The checkboxes for the first three records in the table are now checked.

Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	St	
<input checked="" type="checkbox"/>	Landlord99	111 Yew Tree Close, Hurw...	18/11/2025	18/11/2025	£ 7,000.00	Email	Nc
<input checked="" type="checkbox"/>	Adrian Green	919 Pelaw Crescent, Che...	18/11/2025	18/11/2025	£ 6,160.00	Email	Nc
<input type="checkbox"/>	Landlord25	822 Pelaw Crescent, Ch...	18/11/2025	18/11/2025	£ 6,336.00	Email	Nc
<input type="checkbox"/>	Lettings Landlord42	711 Pelaw Crescent, Che...	18/11/2025	18/11/2025	£ 6,336.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	63 Woodland Road, Darli...	12/11/2025	12/11/2025	£ 11,616.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	Nc
<input type="checkbox"/>	Margaret Morgan	771 Pelaw Crescent, Che...	12/11/2025	12/11/2025	£ 4,224.00	Email	Nc
<input type="checkbox"/>	Margaret Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	Nc
<input type="checkbox"/>	Arthur Morgan	319 Yew Tree Close, Hur...	12/11/2025	12/11/2025	£ 2,288.00	Email	Nc
<input type="checkbox"/>	Pamela Green	712 Pelaw Crescent. Che...	12/11/2025	12/11/2025	£ 814.00	Email	Gr

18

Click **"Select report file"** and select the type of statement that is being used for the selected records. The list will show standard report types plus any bespoke options you have requested.

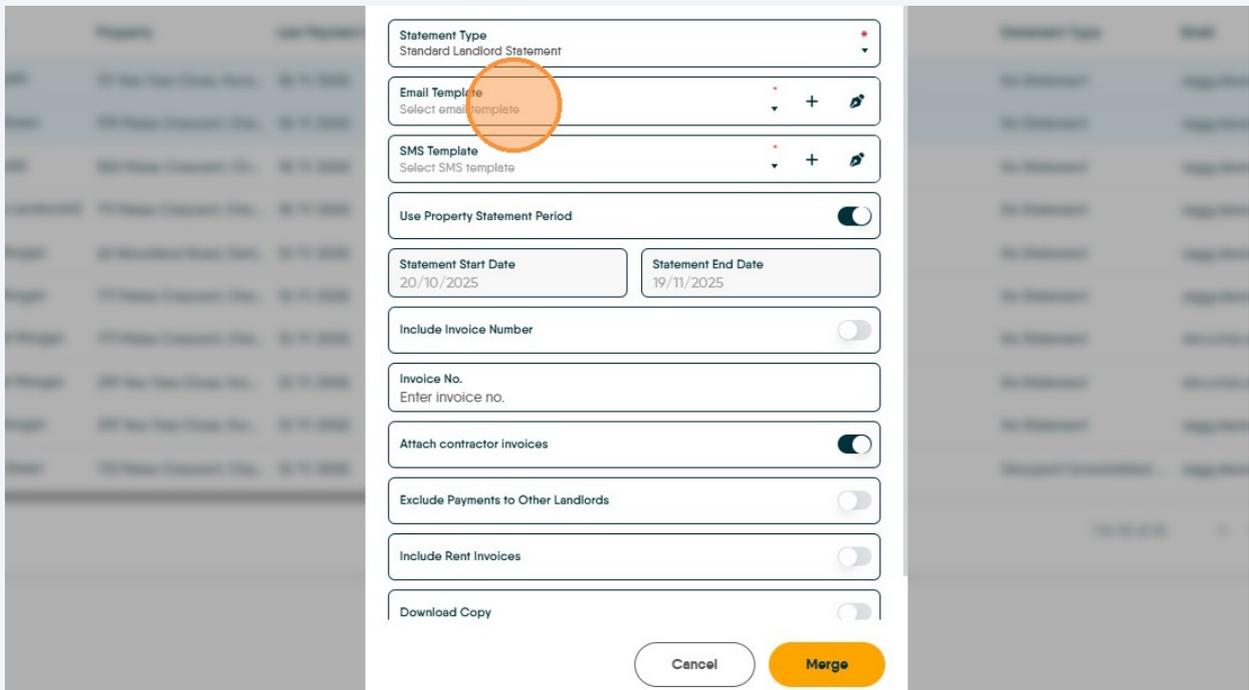


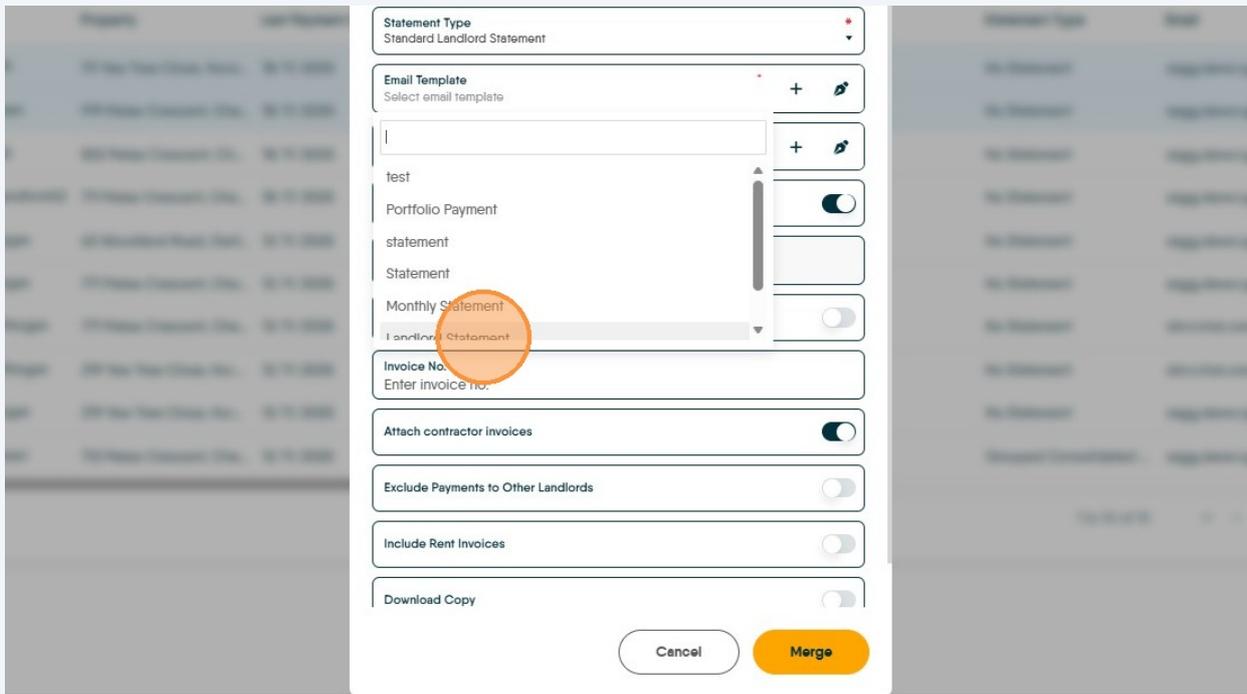


19

Click **"Select email template"** select the required template from the drop down menu. **N.B.** An email or SMS template **MUST** be added to send a statement merge to clients.

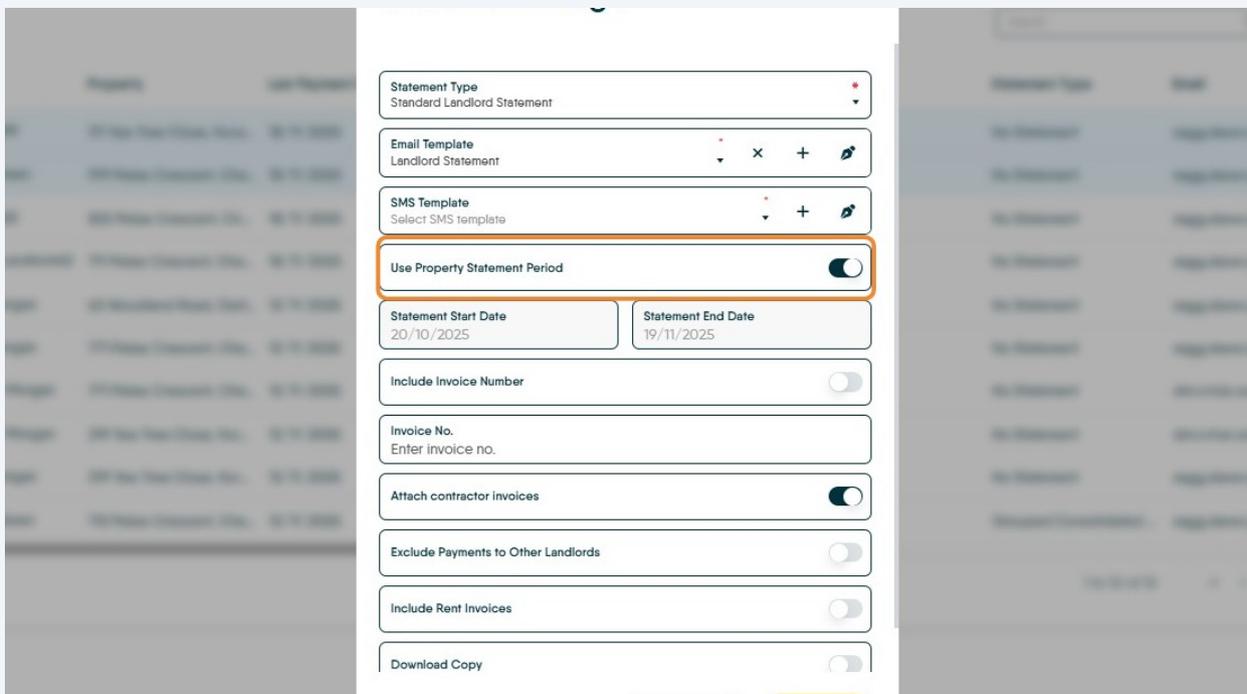
To create a new template click the '+' icon to edit a template select template to edit and click the 'pen' icon





20

Click **"Use Property Statement Period"** this option is a default option in config and will ensure that your clients are sent the correctly dated statements, from the last statement sent to the date you are producing the statement merge regardless if this is 1 day since the last statement or hundreds. We would advise this is left enabled by default and disabled only when specific circumstances require.



21

If you are sending statement for **HMRC Making Tax Digital** purposes (e.g. monthly statements) Turn off the "Use Property Statement Period" option. Click "Statement Start Date" and edit to the first day of the month and "Statement End Date" to the last day of the month you are sending the statement for.

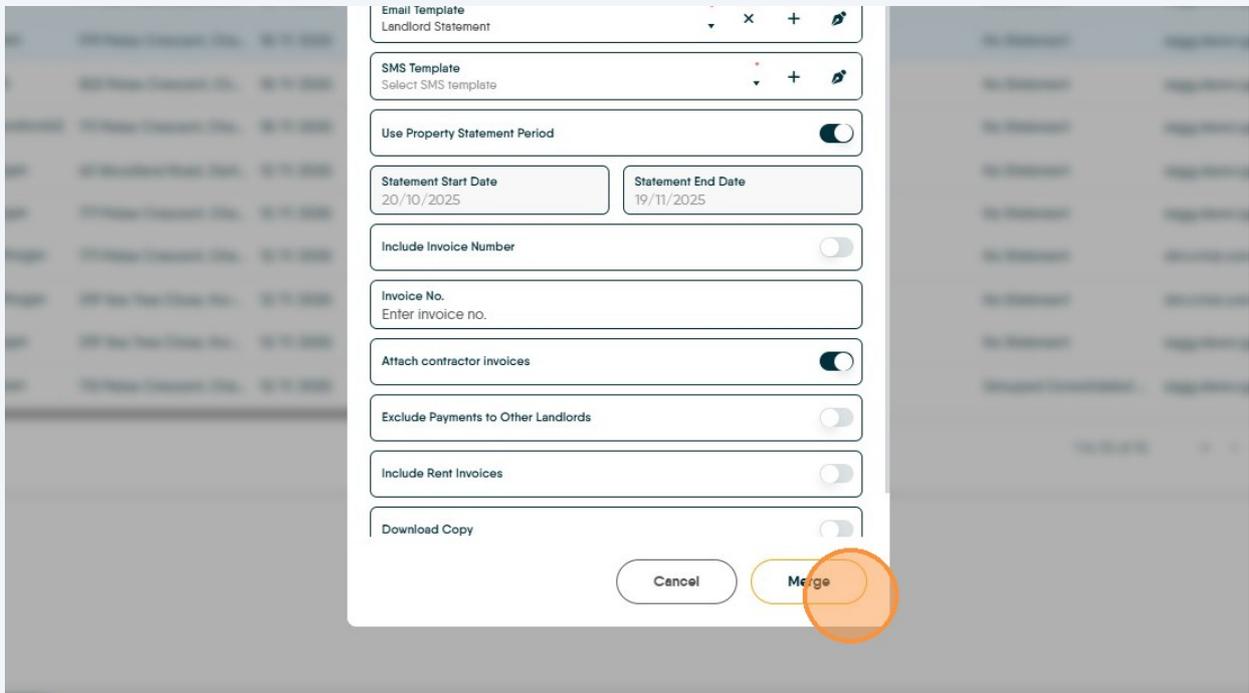
The screenshot shows a configuration form for a statement. The 'Statement Start Date' is set to 20/10/2025 and the 'Statement End Date' is set to 19/11/2025. These two date fields are highlighted with an orange border. Other options include 'Statement Type' (Standard Landlord Statement), 'Email Template' (Landlord Statement), 'SMS Template' (Select SMS template), 'Use Property Statement Period' (checked), 'Include Invoice Number' (unchecked), 'Invoice No.' (Enter invoice no.), 'Attach contractor invoices' (checked), 'Exclude Payments to Other Landlords' (unchecked), 'Include Rent Invoices' (unchecked), and 'Download Copy' (unchecked).

22

Click "**Attach Contractor Invoices**" this will include any contractor statements that were added to the Property Management module when the job was completed, or that were added in Accounts>Expenses when the job was invoiced to the Landlord.

This screenshot is identical to the one above, but with an orange circle highlighting the 'Attach contractor invoices' toggle switch, which is currently turned on. At the bottom of the form, there are 'Cancel' and 'Merge' buttons.

23 Click "Merge"



24 The statement will then be merged and emailed out with a status screen showing the progress. This can take a while as it depends on how much data is in the statements that are to be sent out and how many recipients there are.

