

# MTD - Create a Quarterly Landlord Statement Merge



Learn how to create a Quarterly landlord statement merge in accordance with the new rules for HMRC Making Tax Digital from iamproperty CRM. This guide will walk you through the necessary steps to create a landlord merge.

We have also included dates for 2026 report and a link to the HMRC webpage that explains what needs to be sent and when.



**Alert!** If You usually run your (monthly) Landlord statements using 'Property' the quarterly statement **must** be run as 'Landlord' else it will irreversibly amend the start date of their next monthly statement run.

**Also;** You will need the 'Consolidated Landlord Statement' to run this report, if you don't have it please contact CRM Support on [crm.support@iamproperty.com](mailto:crm.support@iamproperty.com) and request the report to be added.

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

The screenshot shows the 'iam property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is present with the text 'Search all records'. Below the navigation, there are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. The main content area is divided into two sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a list of events with columns for 'Time' and 'Name'. The 'My tasks' section shows a list of tasks with columns for 'Status', 'Name', 'Priority', 'Start date', and 'Due date'.

Time	Name
08:00	Jemmas 8-4.30
10:46	Appraisal: 83999 Pelaw Crescent, Chester le Street
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
Not Started	test	High	24/Oct/2025	24/Oct/2025
Not Started	Visit	High	28/Oct/2025	28/Oct/2025
Not Started	title	High	29/Oct/2025	29/Oct/2025

## 2 Click "Accounts"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Accounts' menu is highlighted with an orange circle. Below the navigation bar, the user is greeted with 'Welcome back, Training'. There are three main action buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar is present with the placeholder text 'Search all records'. Below the search bar, there are two panels: 'Today's events' and 'My tasks'. The 'Today's events' panel shows a list of events with columns for Time and Name. The 'My tasks' panel shows a table of tasks with columns for Status, Name, Priority, Start date, and Due date.

Time	Name
08:00	Jemmas 8-4.30
10:46	Appraisal: 83999 Pelaw Crescent, Chester le Street
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
Not Started	test	High	24/Oct/2025	24/Oct/2025
Not Started	Visit	High	28/Oct/2025	28/Oct/2025

## 3 Click "Landlord"

The screenshot shows the iamproperty CRM dashboard with the 'Landlord' menu highlighted in the sub-navigation bar. The sub-navigation bar includes 'Accounts dashboard', 'General', 'Landlord', and 'Tenant'. The rest of the dashboard content is identical to the previous screenshot, including the 'Welcome back, Training' message, action buttons, search bar, and task/event panels.

Time	Name
08:00	Jemmas 8-4.30
10:46	Appraisal: 83999 Pelaw Crescent, Chester le Street
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
Not Started	test	High	24/Oct/2025	24/Oct/2025
Not Started	Visit	High	28/Oct/2025	28/Oct/2025

## 4 Click "Statement Merge"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A 'My account' button is visible in the top right. Below the navigation, there are tabs for 'General', 'Landlord', and 'Tenant'. The main content area displays a grid of options: 'HMRC Payments', 'Perform Payments', and 'Rapid Pay'. The 'Statement Merge' button is circled in orange.

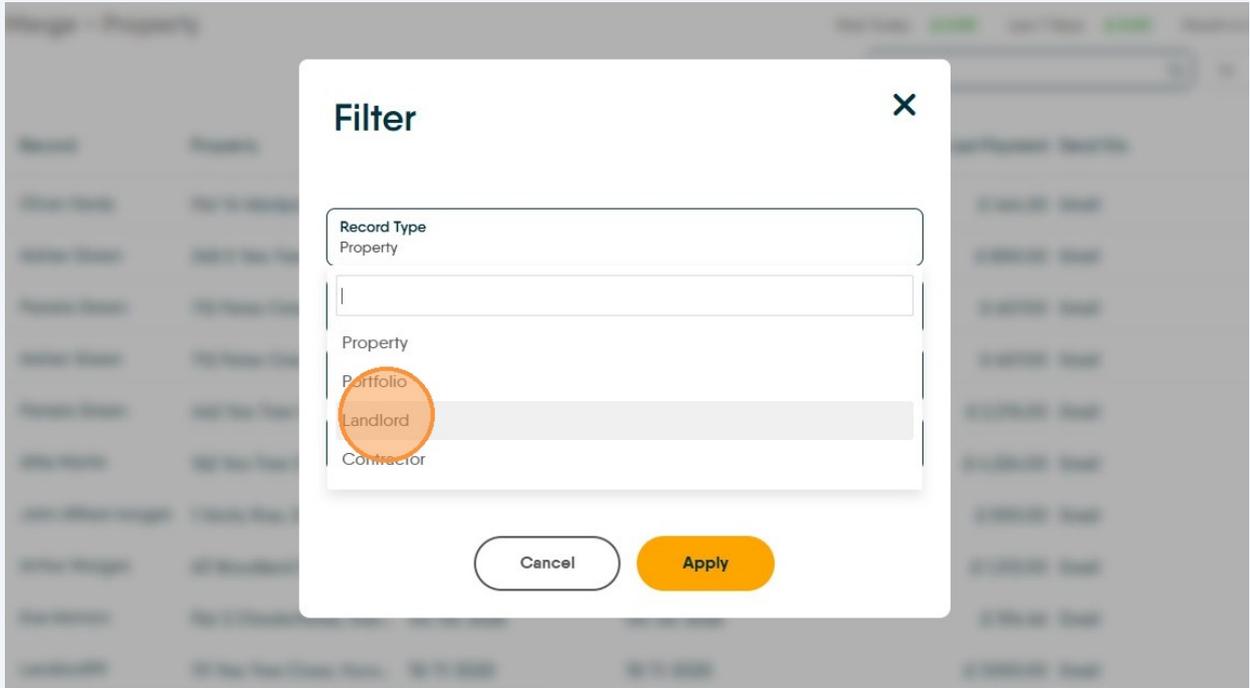
## 5 Click here to open the Filters menu.

The screenshot shows the 'Statement Merge - Property' table. The table has columns for 'Record', 'Property', 'Last Payment Date', 'Date Added', 'Last Payment', 'Send Via', and 'Sta'. A filters menu icon is circled in orange. The table contains the following data:

Record	Property	Last Payment Date	Date Added	Last Payment	Send Via	Sta	
<input type="checkbox"/>	Oliver Hardy	Flat 14 Westpoint, Northu...	17/02/2026	17/02/2026	£ 464.20	Email	Lai
<input type="checkbox"/>	Adrian Green	345 5 Yew Tree Close, H...	17/02/2026	17/02/2026	£ 800.00	Email	No
<input type="checkbox"/>	Pamela Green	712 Pelaw Crescent, Che...	04/02/2026	04/02/2026	£ 407.00	Email	Gr
<input type="checkbox"/>	Adrian Green	712 Pelaw Crescent, Che...	04/02/2026	04/02/2026	£ 407.00	Email	No
<input type="checkbox"/>	Pamela Green	442 Yew Tree Close, Hur...	04/02/2026	04/02/2026	£ 2,376.00	Email	Gr
<input type="checkbox"/>	Alfie Martin	162 Yew Tree Close, Hur...	04/02/2026	04/02/2026	£ 4,224.00	Email	No
<input type="checkbox"/>	John Alfred morgan	1 Verity Rise, Darlington	04/02/2026	04/02/2026	£ 500.00	Email	No
<input type="checkbox"/>	Arthur Morgan	63 Woodland Road, Darli...	04/02/2026	04/02/2026	£ 1,212.00	Email	No
<input type="checkbox"/>	Eve Harmon	Flat 2 Chesterfields, Stan...	04/02/2026	04/02/2026	£ 104.46	Email	No
<input type="checkbox"/>	Landlord199	111 Yew Tree Close, Huru...	18/11/2025	18/11/2025	£ 7000.00	Email	No

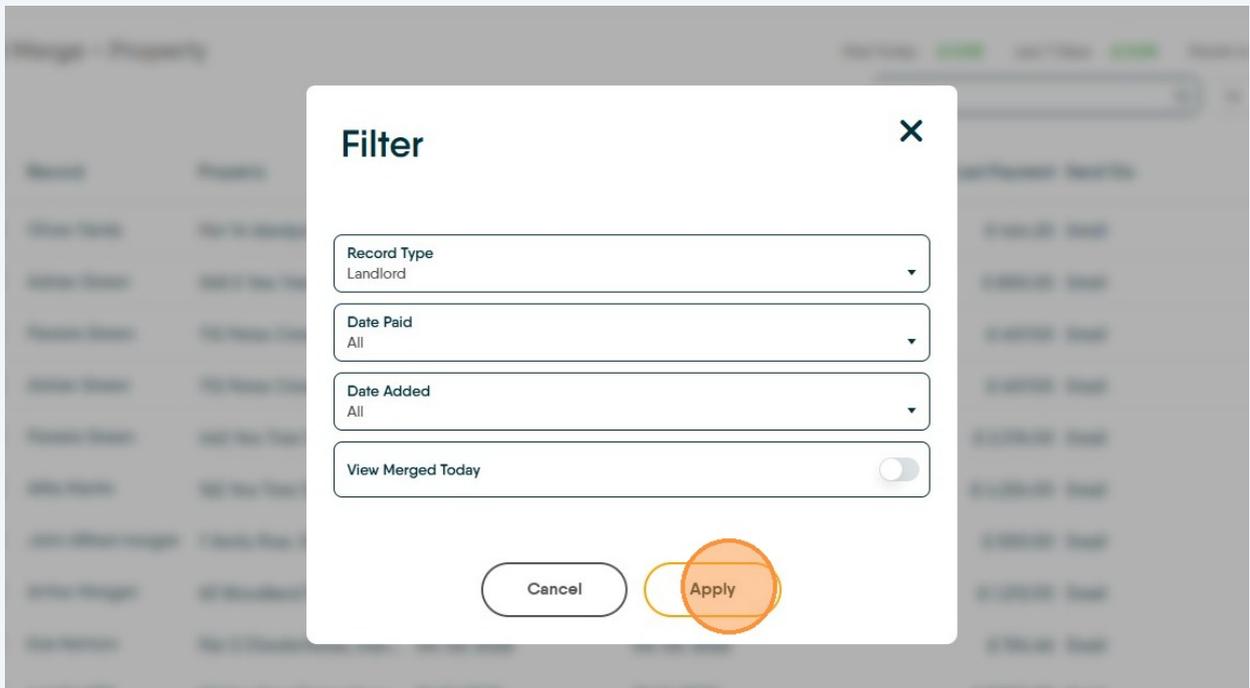
6

From the drop down menu select **"Landlord"** this will create a report for a specific landlord, rather than the usual setting of property which creates a report per property.



7

Click **"Apply"**





**Top Tip!** - If you want to easily identify those landlords who want/need a quarterly statement you can use the statement type field on the Landlord record to select Consolidated Statement and this will feed through onto the filters on the statement merge. This is in the Landlord Record, in the Financial Information section.

To sort the list of Landlord, type 'Consolidated' into the "Search" field.

## Financial Information

Overseas <input type="checkbox"/>	Tax Enabled <input type="checkbox"/>
Exclude From Payments <input type="checkbox"/>	
Registration No	CNR No
CNR Approval Date 01/01/1900	Tax Rate 0.00
VAT Registration No	HMRC Due Date 01/01/1900
Statement Consolidated Statement ▼	Send Statement Via Email ▼
Safe Deposits Type Registered ▼	Safe Deposits Reg. No.



8

Click this checkbox to select all the Landlord records, or click the checkbox next to each of the Landlords you need to send a statement email to. (If you have followed our suggestion above) To sort the list to only show the Landlords requiring a Quarterly statement type 'Consolidated' into the search field

Statement Merge - Landlord

Paid Today £ 0.00 Last 7 Days £ 880.00 Month to Date £ 88

Search [ ] 10

<input type="checkbox"/> Record	Last Payment Date	Date Added	Last Payment	Send Via	Statement Type	Em
<input type="checkbox"/> Emily Blunt	17/03/2026	17/03/2026	£ 880.00	Letter	Landlord Statement	eb
<input type="checkbox"/> Oliver Hardy	17/02/2026	17/02/2026	£ 464.20	Email	Landlord Statement	zaq
<input type="checkbox"/> Adrian Green	17/02/2026	17/02/2026	£ 800.00	Email	No Statement	zaq
<input type="checkbox"/> Pamela Green	04/02/2026	04/02/2026	£ 407.00	Email	Grouped Consolidated ...	zaq
<input type="checkbox"/> Alfie Martin	04/02/2026	04/02/2026	£ 4,224.00	Email	No Statement	zaq
<input type="checkbox"/> John Alfred morgan	04/02/2026	04/02/2026	£ 500.00	Email	No Statement	zaq
<input type="checkbox"/> Arthur Morgan	04/02/2026	04/02/2026	£ 1,212.00	Email	No Statement	zaq
<input type="checkbox"/> Eve Harmon	04/02/2026	04/02/2026	£ 104.46	Email	No Statement	zaq
<input type="checkbox"/> Jennifer Lawrence	10/12/2025	10/12/2025	£ 930.00	Email	Landlord Statement	jite
<input type="checkbox"/> Chris Hensworth	10/12/2025	10/12/2025	£ 930.00	Email	Landlord Statement	ch

9

Click the 'Merge' icon to start creating your quarterly statements.

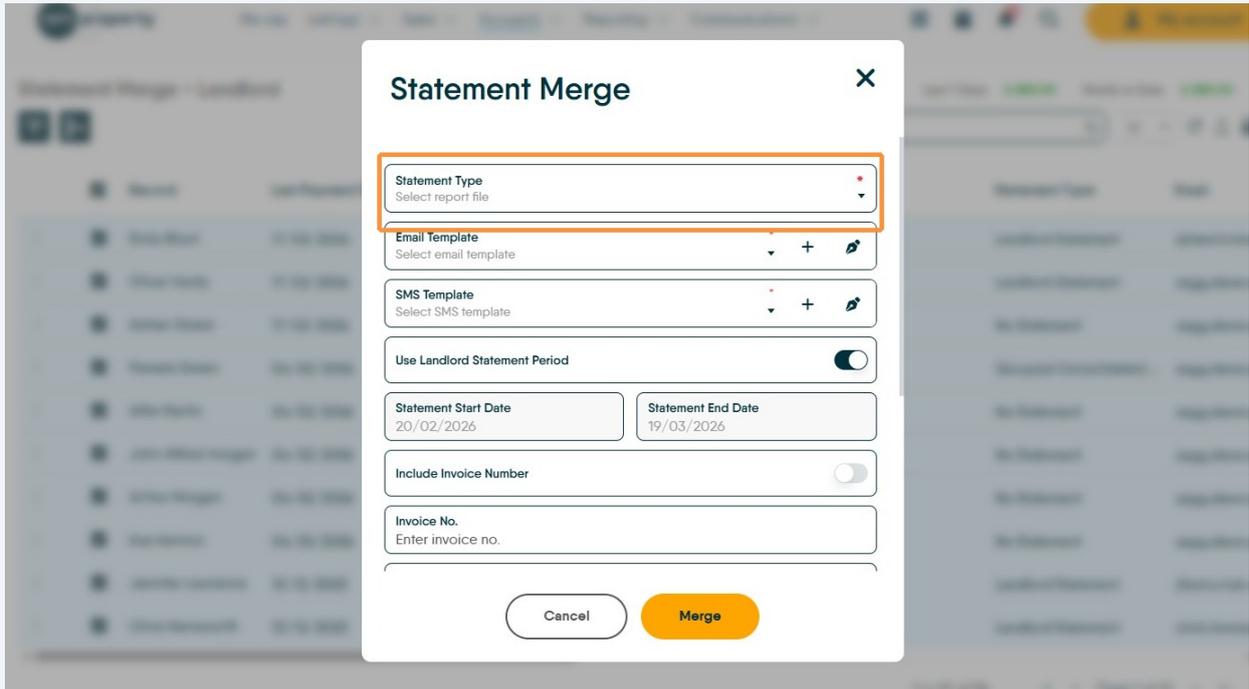
Statement Merge - Landlord

Paid Today £ 0.00 Last 7 Days £ 880.00 Month to Date £ 88

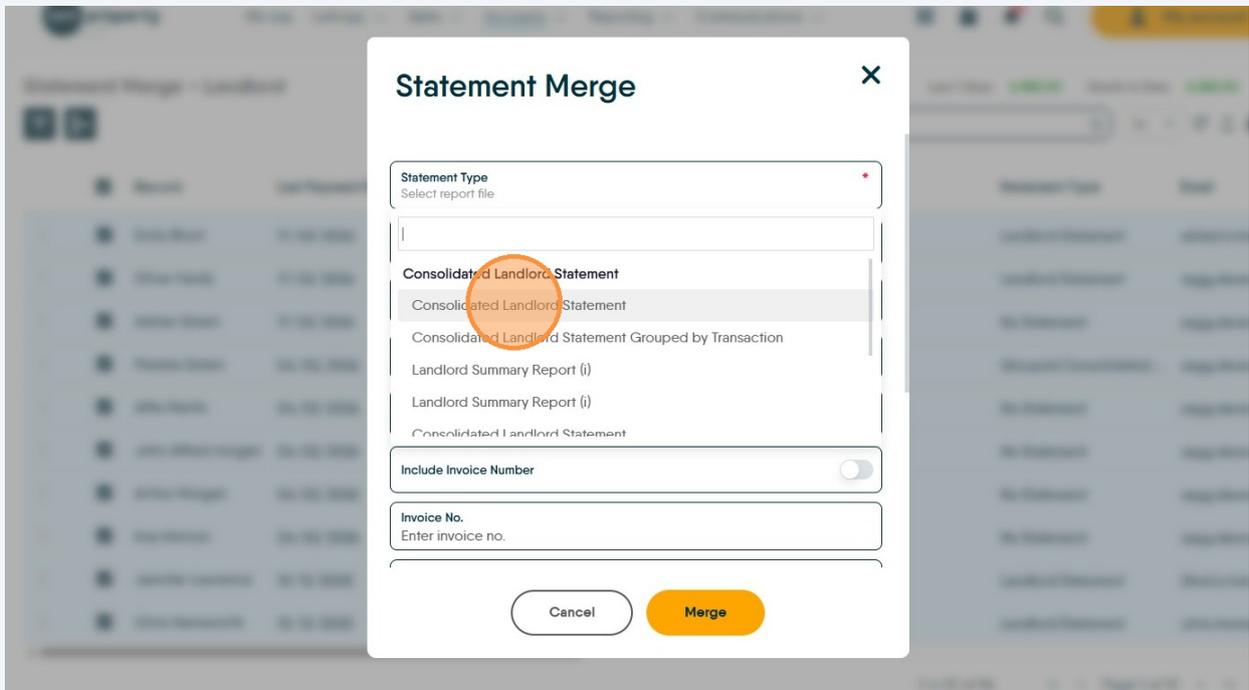
Search [ ] 10

<input checked="" type="checkbox"/> Record	Last Payment Date	Date Added	Last Payment	Send Via	Statement Type	Em
<input checked="" type="checkbox"/> Emily Blunt	17/03/2026	17/03/2026	£ 880.00	Letter	Landlord Statement	eb
<input checked="" type="checkbox"/> Oliver Hardy	17/02/2026	17/02/2026	£ 464.20	Email	Landlord Statement	zaq
<input checked="" type="checkbox"/> Adrian Green	17/02/2026	17/02/2026	£ 800.00	Email	No Statement	zaq
<input checked="" type="checkbox"/> Pamela Green	04/02/2026	04/02/2026	£ 407.00	Email	Grouped Consolidated ...	zaq
<input checked="" type="checkbox"/> Alfie Martin	04/02/2026	04/02/2026	£ 4,224.00	Email	No Statement	zaq
<input checked="" type="checkbox"/> John Alfred morgan	04/02/2026	04/02/2026	£ 500.00	Email	No Statement	zaq
<input checked="" type="checkbox"/> Arthur Morgan	04/02/2026	04/02/2026	£ 1,212.00	Email	No Statement	zaq
<input checked="" type="checkbox"/> Eve Harmon	04/02/2026	04/02/2026	£ 104.46	Email	No Statement	zaq
<input checked="" type="checkbox"/> Jennifer Lawrence	10/12/2025	10/12/2025	£ 930.00	Email	Landlord Statement	jite
<input checked="" type="checkbox"/> Chris Hensworth	10/12/2025	10/12/2025	£ 930.00	Email	Landlord Statement	ch

10 Click "Statement Type"



11 From the drop down menu select "Consolidated Landlord Statement"



12

Click here and from the drop down menu select the Template you are using for the quarterly statement e.g. we have created 'Quarterly Statement' so would select that option.  
Click **"Quarterly Statement"**

The screenshot shows the 'Statement Merge' dialog box. The 'Email Template' dropdown menu is highlighted with an orange circle. The dialog box contains the following fields and options:

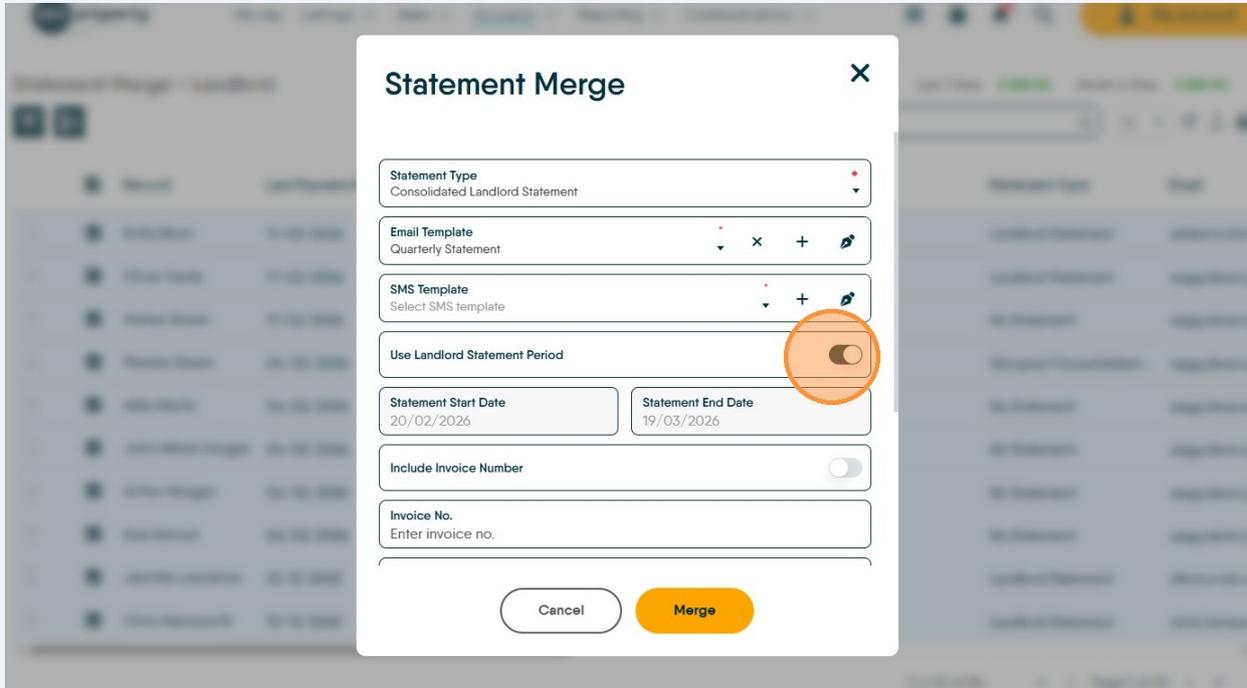
- Statement Type:** Consolidated Landlord Statement
- Email Template:** Select email template (highlighted)
- SMS Template:** Select SMS template
- Use Landlord Statement Period:**
- Statement Start Date:** 20/02/2026
- Statement End Date:** 19/03/2026
- Include Invoice Number:**
- Invoice No.:** Enter invoice no.
- Buttons:** Cancel, Merge

The screenshot shows the 'Statement Merge' dialog box with the 'Email Template' dropdown menu open. The 'Quarterly Statement' option is highlighted with an orange circle. The dialog box contains the following fields and options:

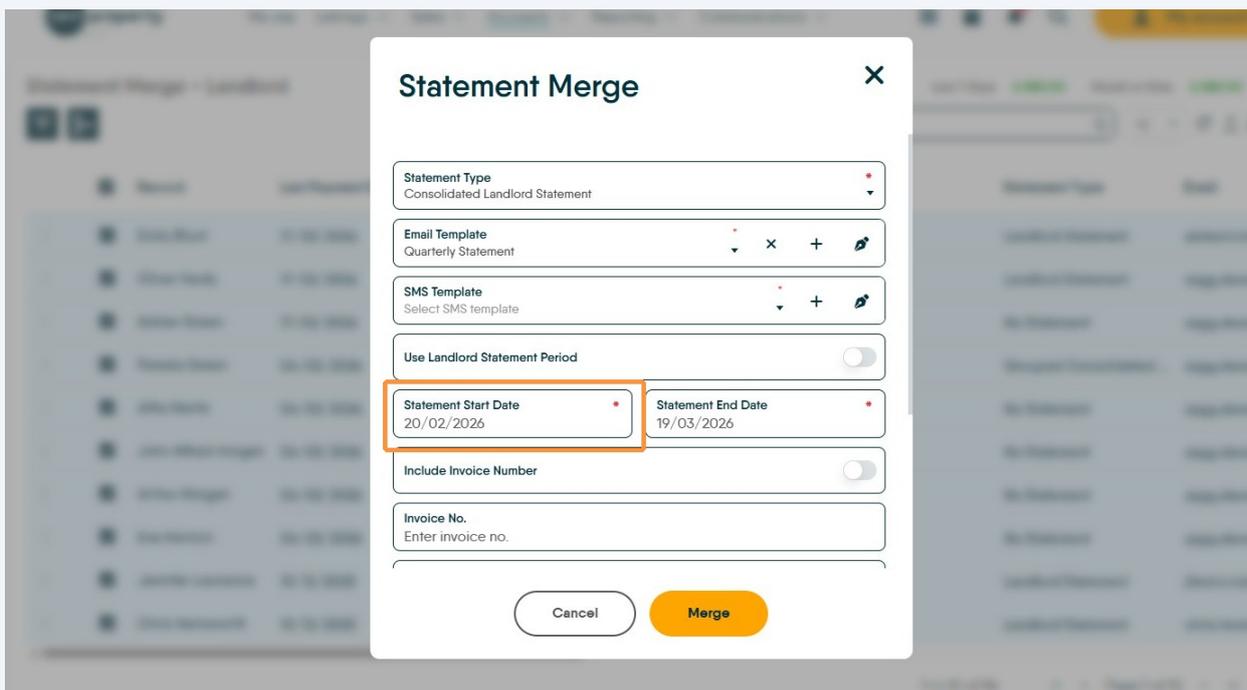
- Statement Type:** Consolidated Landlord Statement
- Email Template:** Select email template (dropdown menu open)
- SMS Template:** Select SMS template
- Use Landlord Statement Period:**
- Statement Start Date:** 20/02/2026
- Statement End Date:** 19/03/2026
- Include Invoice Number:**
- Invoice No.:** Enter invoice no.
- Buttons:** Cancel, Merge

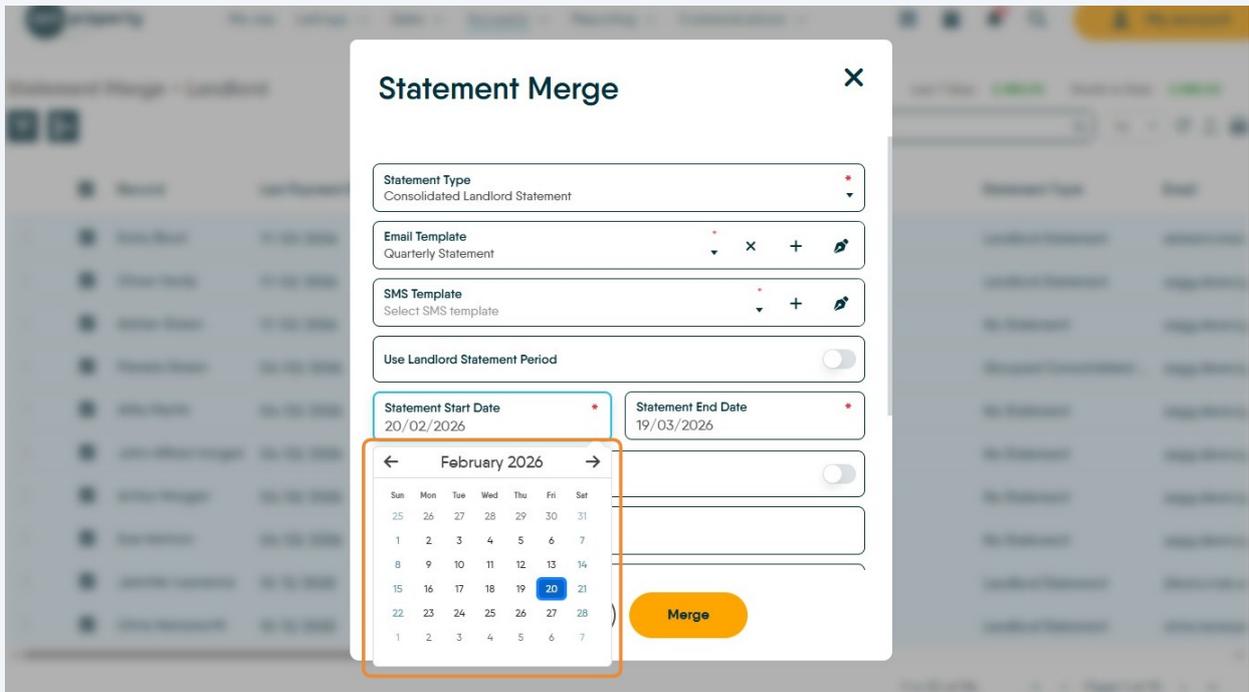
13 Click here and turn OFF the '**Use Landlord Statement Period**' option.

It is possible this is already disabled (if so it will show grey as in the following screen), however CRM best practice is to have this option enabled for sending Monthly statements to Landlords.



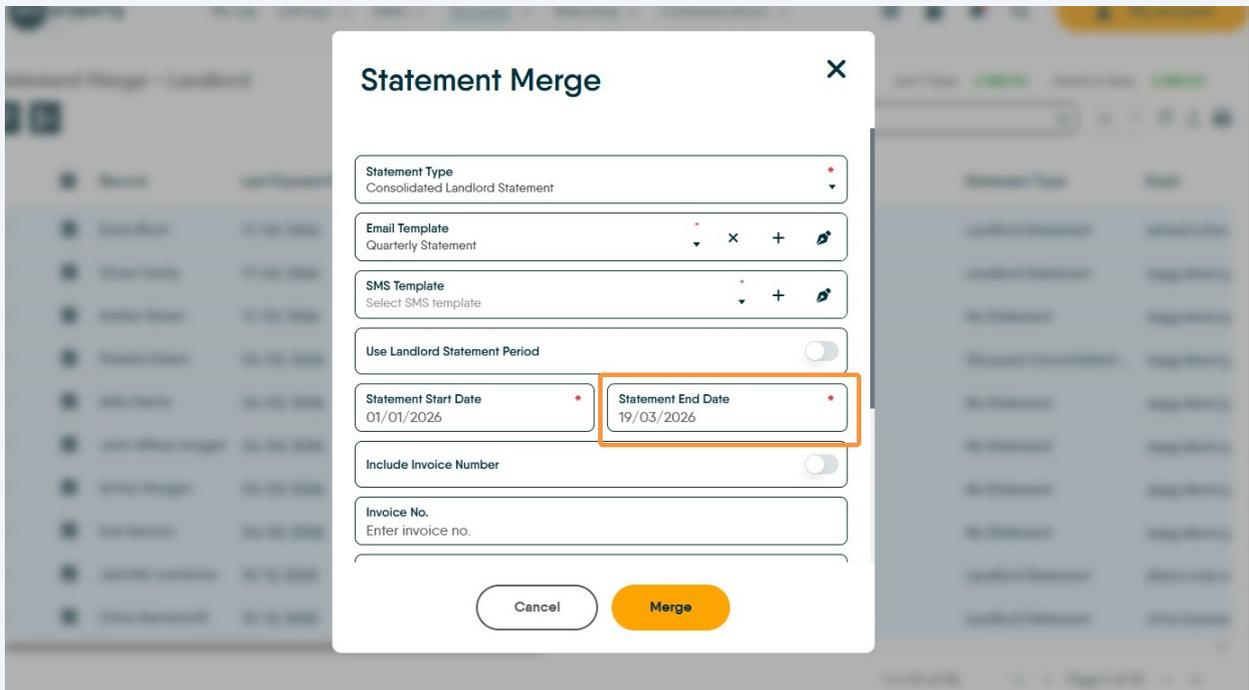
14 Click the "**Statement Start Date**" field and from the drop down calendar select the start of the quarter you are creating the statement for. Click "February 2026"





15

Click "**Statement End Date**" and set the date that denotes the end of the quarter. You must be past the end of the quarter and have concluded all the appropriate transactions to run this report.



16

Click **"Merge"** this will then create the statements, attach them to emails and send out to the Landlords selected.

Statement Merge

Statement Start Date 01/01/2026

Statement End Date 19/03/2026

Include Invoice Number

Invoice No.  
Enter invoice no.

Attach contractor invoices

Exclude Payments to Other Landlords

Group Landlord Payments

Download Copy

Cancel Merge

## Update Periods



The following information comes from the HMRC website the link to this information is [here](#) This webpage details all the information that is required to be sent and the dates the information should relate to and the deadlines

## 17 Using standard update periods

The standard update periods are based on the tax year.

Once each update period has ended, you need to send your update within one month.

The following table sets out the update periods and deadlines that apply.

<b>Update period</b>	<b>Update deadline</b>
6 April to 5 July	7 August
6 April to 5 October	7 November
6 April to 5 January	7 February
6 April to 5 April	7 May

18

### Using calendar update periods

You can choose to send quarterly updates that end on the last day of month. This will make your record keeping simpler if your accounting period ends on 31 March.

You'll need to meet the same deadlines as standard update periods.

The following table sets out the update periods and deadlines that apply.

<b>Update period</b>	<b>Update deadline</b>
1 April to 30 June	7 August
1 April to 30 September	7 November
1 April to 31 December	7 February
1 April to 31 March	7 May