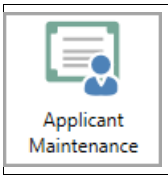
Applicant Maintenance

Last Modified on 09/11/2026 12:10 pm AEST

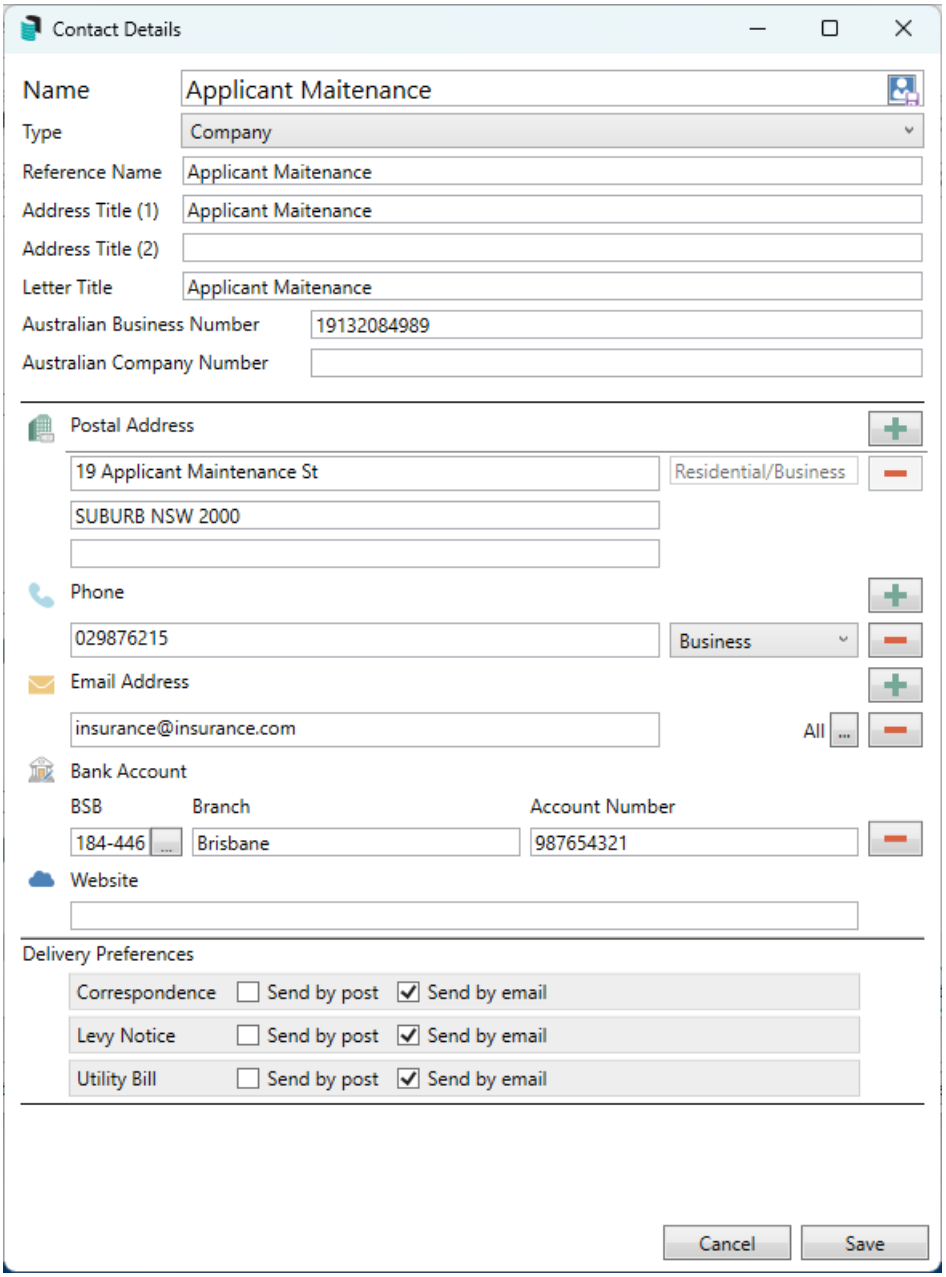
	The instructions in this article relate to ***Applicant Maintenance*** (formerly known as ***Certificate Applicants).*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search.*

Add/Change/Delete

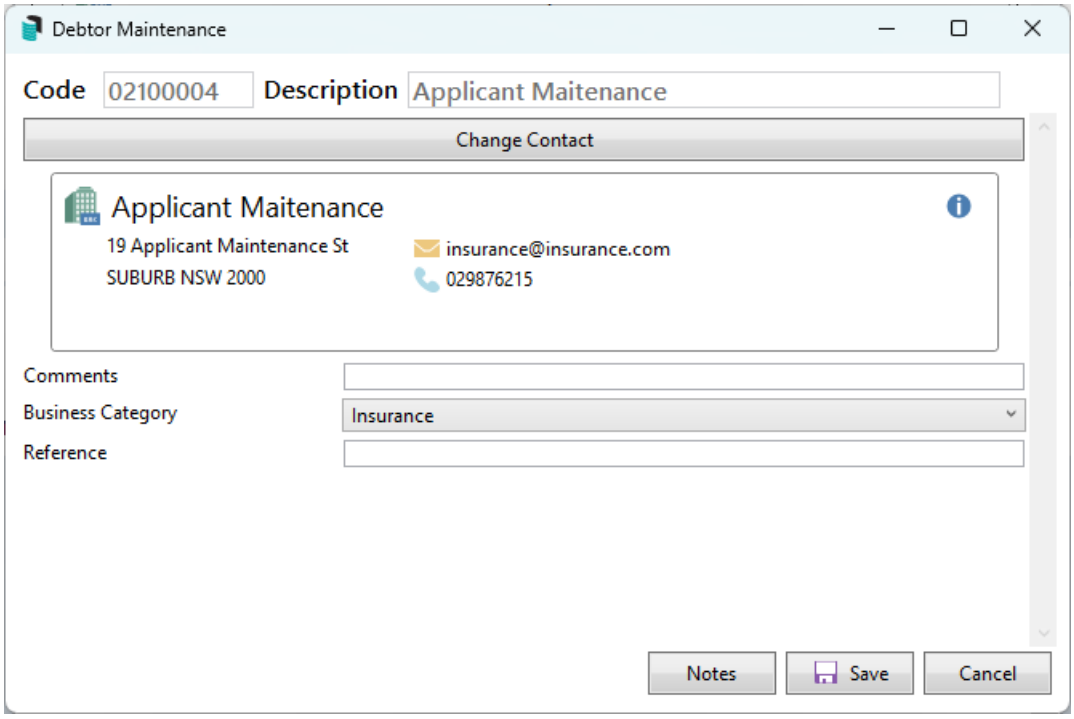
Recording an applicant's contact details allows that contact information to be used in the various areas where these records are used. When the business category has been nominated, these applicant records can be used in places like ***Certificates***, ***Legal Action*** and ***Insurance.*** The same contact that may be used in this area can also be added to other areas like ***Creditor Maintenance*** *to allow invoices to be paid.*

Adding a contact to Applicant Maintenance

1. Search or select ***Applicant Maintenance***.
2. Click *Add/Change/Delete*.
3. Click *Add New.*
4. Click *Create/Select Contact.*
5. Search for an existing record using the search bar, and if there is no contact available, click*Create Contac*t.
6. Complete the required field information. Entering as much information as possible will allow this contact to be used in other areas, e.g. ***Creditor Maintenance***.



7. Click *Save.*
8. From the *Debtor Maintenance* window, assign the *Business Category*. This will assist with populating the relevant contacts in the nominated areas.



9. Add any *Comments* or *References.* Click *Save.*
    - *Notes can be added by clicking the Notes button.*

Editing a contact in Applicant Maintenance

The below steps can be used to edit an existing contact from Applicant Maintenance. Please note that any updates to this contact that may be used in other areas will be updated in all areas where this contact is used.

1. Search or select ***Applicant Maintenance***.
2. Click *Add/Change/Delete*.
3. Use the search bar to enter the contact name or scroll through the records to locate the contact that requires changing.
4. Click the pencil icon to edit the information. Update any of the *Debtor Maintenance* field information.
5. If the contact requires updating, click the blue i icon and *Edit*.
6. Update the information as needed.
7. Click *Save*.

Delete a contact in Applicant Maintenance

Deleting contacts from Applicant Maintenance can be done using the steps below.

1. Search or select ***Applicant Maintenance***.
2. Click *Add/Change/Delete*.
3. Use the search bar to enter the contact's name or search the records to locate the contact.

4. Once located, click *Delete*.
5. Click *Yes* to message: Are you sure you want to delete this account?

Certificate Issued Report

The Certificate Issued report will detail all certificates issued for the selected lots. This report can be used to ensure any certificates issued have been billed and can also be helpful to keep a record of the certificates issued.

1. Search or select ***Applicant Maintenance.***
2. Click *Certificates Issued Report.*
3. Tag the Applicant.
4. In the *Limits* tab, set any limits if required.
5. In the *Conditions* tab, set any conditions as required.
6. Click *Change Building* and select the buildings to be included in this report.
7. Click *Proceed.*
8. Click *Print* to print the report, or click *Export* to export to Excel.

Print Applicant List

An applicant list is available in either a PDF-style or Excel report, and will include all of the contacts from the Applicant Maintenance area.

1. Search or select ***Applicant Maintenance.***
2. Click *Report.*
3. From the Applicant Master List window, set for Screen (PDF) or Excel for an Excel worksheet.
4. Select the *Select Codes* to tag applicants or *Business Category* if required for a specific type.
5. Click *OK*.
6. Save Report as needed.

Purge Old Certificate Applicants

The following process will delete all records of certificates printed up to and including the specified date.

1. Search or select ***Applicant Maintenance.***
2. Click *Purge Old Records.*
3. Type in the last date for record clearance then click *OK.*
4. When asked: Records up to and including [the date typed] will be deleted. OK? click *Yes*.

Label Printing

1. Search or select ***Applicant Maintenance***.
2. Click Label Printing.
3. To remove any duplicated addresses for multiple certificate applicants, click*Remove Duplications.*
4. Tag the applicants to include in this label print. If none are tagged then all applicants will be selected.
5. Select the report order.
    - Code Number Order
    - Alphabetical Order
6. Click *Proceed.*
7. Set label options as you prefer.
8. Click *Print.*

Word Data Files

Word Data files are no longer available, and ***Merge Letters*** should be used for document and merge field applications.

API Endpoint for Applicants

A new API endpoint was introduced in StrataMax version 5.6.166 - specifically added at /api/master-chart/applicants to assist in identifying applicant data.

Fields returned are:

- Account Code
- Description
- Contact ID
- Comments
- Business Category

Where there are multiple contacts for an applicant, data will be returned in multiple rows.

```
  {
    "divisionId": 1,
    "accountCode": "02100025",
    "description": "AMS APPLICANT SERVICES",
    "contactId": "a29b3c93-d233-4b4b-89f4-62c0eae33e73",
    "comments": "Test Comments",
    "businessCategory": "Certificate"
  },
  {
    "divisionId": 1,
    "accountCode": "02100025",
    "description": "AMS APPLICANT SERVICES",
    "contactId": "91af4013-ca9b-46ed-b7a9-131a2b5b766d",
    "comments": "Test Comments",
    "businessCategory": "Certificate"
  }
],
"count": 24
```