



# Total Expert Teams to MAXA Offices

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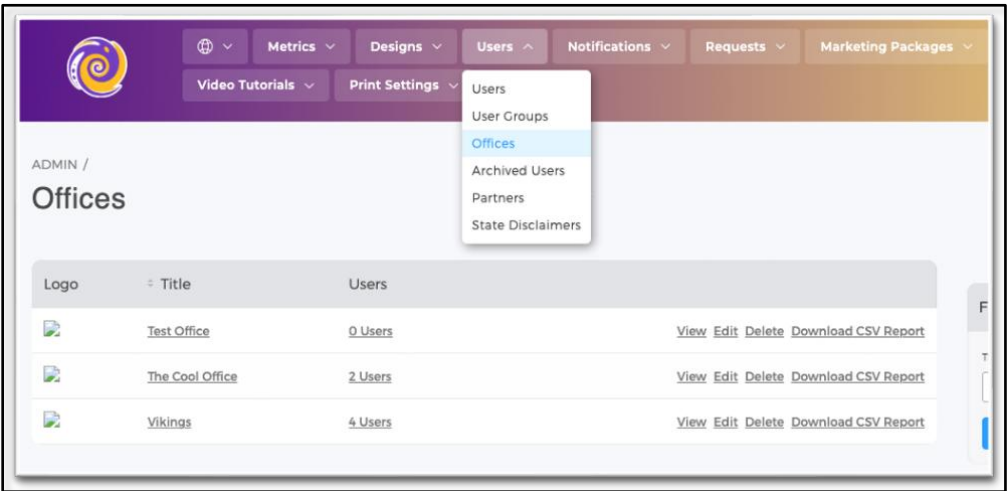
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## Overview

When your organization connects Total Expert (TE) with MAXA, your *teams* in TE become *offices* in MAXA. This guide explains what changes (and what does not) during this mapping, so you know where to look for users and roles.



## How It Maps: Total Expert → MAXA

- teams → offices
- team members → office users
- team managers → office managers (with the Manager role in MAXA)



Total Expert

Vikings

Edit

<input type="checkbox"/>	Manager	Name	Role	Email	Job Title	Cost Center	Address	Address 2	City	State	Added On
<input type="checkbox"/>	<div><div></div><div>yes</div></div>	Marketing Admin	Marketing	marketing@mpil.com	--	--	1234 Main Way	--	Pleasantville	MN	09/25/2025 04:55 PM
<input type="checkbox"/>	<div><div></div><div>no</div></div>	Charlie Content	Loan Officer	charlie.content@mpil.com	Loan Officer	001	1234 Main Way	--	Pleasantville	MN	09/25/2025 04:55 PM
<input type="checkbox"/>	<div><div></div><div>no</div></div>	Maria Lenderton	Loan Officer	maria.lenderton@mpil.com	Loan Officer	001	1234 Main Way	--	Pleasantville	MN	09/25/2025 04:55 PM
<input type="checkbox"/>	<div><div></div><div>yes</div></div>	Larry Lender	Loan Officer	apl@mpil.com	Loan Officer	004	1234 Stuff	--	Here	AL	09/25/2025 04:55 PM
<input type="checkbox"/>	<div><div></div><div>no</div></div>	Jane Doe	Loan Officer	xxl@mpil.com	Loan Officer	--	--	--	--	--	09/25/2025 05:10 PM
No more rows.											

Maxa

Manage Team

Team Members

Team Designs

Get Analytics

Invite More People

Office

Manage

Charlie Content

charlie.content@mpil.com

Last Seen on Sep 10 12:45m

The Cool Team, Vikings

Designs: 1

...

Jane Doe

xxl@mpil.com

Last Seen on Aug 10 12:45m

Vikings

Designs: 0

...

Maria Lenderton

maria.lenderton@mpil.com

Last Seen on Sep 10 12:45m

Vikings, The Cool Team

Designs: 0

Invites: 0 of 50

...

Marketing Admin

marketing@mpil.com

Last Seen on Sep 10 12:45m

Vikings

Designs: 101

Invites: 1 of 50

...

## Important Notes

- **Automatic sync** – When you create, edit, or delete a team in TE, the corresponding office in MAXA is updated accordingly.
- **Multiple managers** – If a team has more than 1 manager in TE, all will appear as office managers in MAXA.
- **Multiple roles** – Users can have multiple roles simultaneously. Someone can be both an administrator and a manager in TE and MAXA, receiving administrator permissions plus manager capabilities for their assigned offices.
- **User view, not team view** – MAXA is built around users, not team rosters. You will not see a full list of office members in one place. Instead, check a user's profile to see:
  - **Offices** – All offices the user belongs to.
  - **Managed offices** – All offices where the user is designated as a manager.

### Organization

Manager

Offices

× Vikings

× The Cool Office

Managed Offices

× Vikings

\* User should be a member of the managed office

☐ Don't update offices with SSO

Groups

### Note

The Manager field on the User Profile screen is not required for TE → MAXA office manager functionality. A user still appears as an office manager if they are assigned as a team manager in TE.



ADMIN / OFFICES / VIKINGS /

## Edit Office

Details

Title\*

Logo  No file chosen

Disclaimer

Cost center

Concierge email

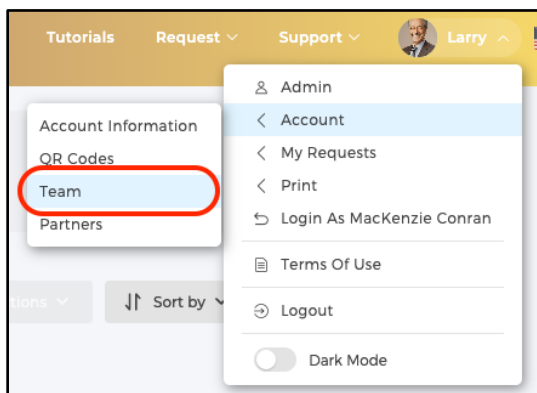
### Note

Only user relationships sync from TE. Any desired office details (like logos or addresses) must be managed directly in MAXA.

## Manager Tools in MAXA

Managers in MAXA can impersonate their users to help create or troubleshoot designs:

1. Click your user's name in the upper-right corner and select **Account** → **Team** from the menu.



### Note

This is the only place where the MAXA user interface uses the word *team* instead of *office*.

2. Locate the user you want to impersonate in the list.
3. On the right side of the user's row, select [...] → **Become**.



## Manage Team

Team Members

Team Designs Get Analytics Invite More People

Office  
Select Office

<input type="checkbox"/>		Charlie Content charlie.content@mppl-mppl.co Last Sign In: Sep 22 2:45pm	The Cool Team, Vikings	Designs: 1	...
<input type="checkbox"/>		Jane Doe xxfitz@mppl.com Last Sign In: Aug 15 10:21am	Vikings	Designs: 0	...
<input type="checkbox"/>		Maria Lenderton maria.lenderton@mppl-mppl.co	Vikings, The Cool Team	Designs: 0	Invites: 0 of 30 ...

Edit

**Become**

Reset Password

Archive Account

Delete Account

**Tip**

If multiple managers are assigned to the same team/office, they can impersonate each other as well as non-manager users.

Impersonation respects MAXA's permissions. Managers can see what the impersonated user can access, not their own manager privileges

## Manager Permissions Controls

Certain permissions that affect office managers are controlled by TE administrators.

- Managers can only become users.
- Managers cannot invite users.
- Managers cannot remove users.
- Managers cannot see or create designs from Concierge.
- Managers can switch admin lock.

## User Profile Option: Don't update offices with SSO

In the MAXA user profile, there is a checkbox labelled **Don't update offices with SSO**.

- When this box is checked, this prevents any team associations from TE from being passed to MAXA for that user.
- This is the only setting in this list that can be controlled at the user level (not by a TE administrator).



## Organization

Manager

Offices

Managed Offices

*\* User should be a member of the managed office*

☒ Don't update offices with SSO

Groups