Total Expert Teams to MAXA Offices

Table of Contents

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.
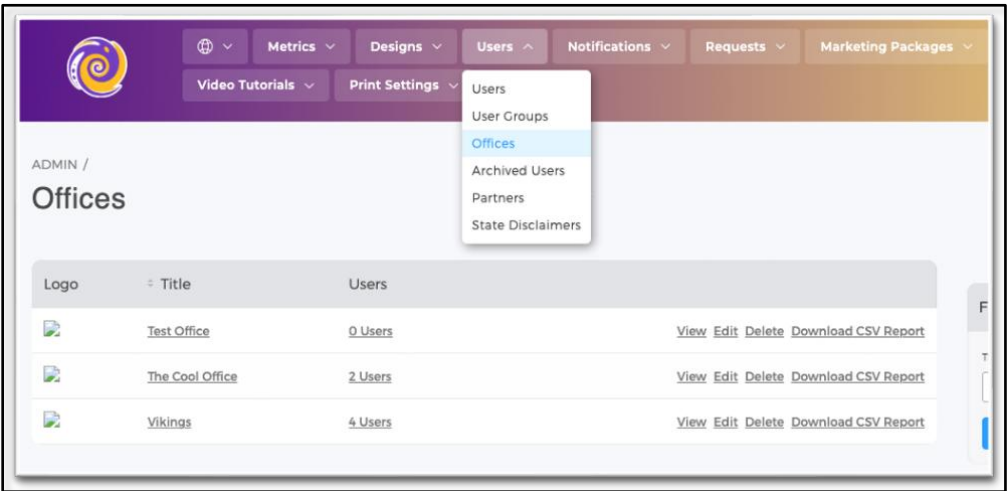
How It Maps: Total Expert → MAXA

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

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.

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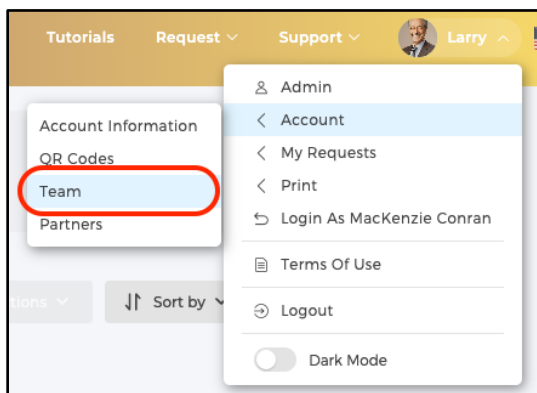
> **Note**
> Only user relationships sync from TE. Any desired office details (like logos or addresses) must be managed directly in MAXA.

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**.

> **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