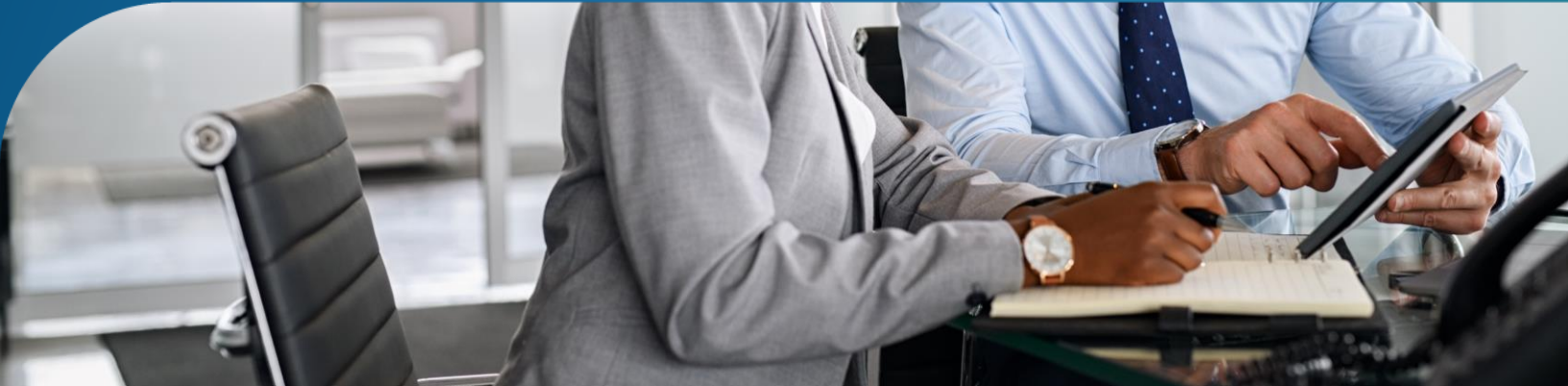


Ask Poli Corporate Admin Job Aid

Poli knows. Just ask.



Ask Poli® is an intelligent business tool designed to assist Fannie Mae’s approved mortgage sellers and servicers to quickly get answers straight from the source.

To access Ask Poli, approved Fannie Mae mortgage sellers and servicers will need their own Fannie Mae (FM) User ID with appropriate Ask Poli permissions. As a Corporate Administrator, you will use Technology Manager to provision Fannie Mae User IDs for your users that require access to Ask Poli.

Note: Creating a Fannie Mae User ID **does not** inherently provide access to technology applications (e.g. Desktop Underwriter® or Condo Project Manager™) which are provisioned by the Corporate Administrator in Technology Manager.

With Ask Poli, there are three easy ways for users to get answers to their questions:



Let Ask Poli predict the answer you need

Type in your question or keyword(s) in the search bar and look for autocomplete suggestions right underneath.



Choose from a list of search results

Type in your question or keyword(s) in the search bar and press “Enter” to see a list of articles.



Use navigational icons to get answers

Use the icons which represent the mortgage loan life cycle, at the top of the page to browse selling and servicing.



Provisioning Process Overview

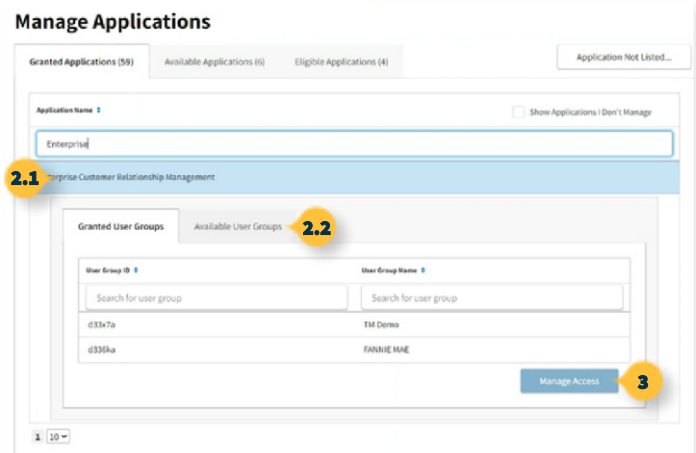
This job aid provides Corporate Administrators with guidance for granting a user group access to the Enterprise Customer Relationship Management (ECRM) application and granting a user access to the Ask Poli role.

Granting a User Group Access to the ECRM Application

Review the [Grant a User Group Access to an Application](#) job aid for a more detailed explanation on how to add an application to the list of Fannie Mae Technology applications a user group can access.

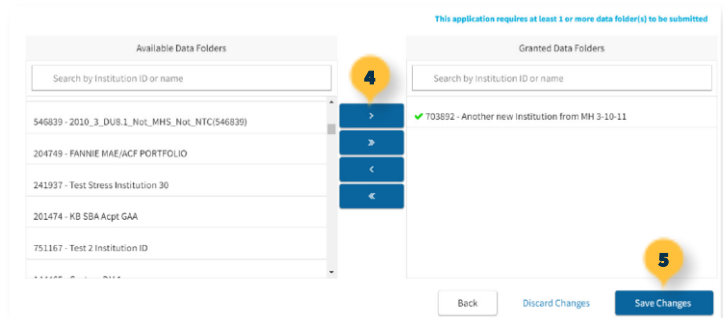
Note: By granting a user group access to an application, users in the group are NOT automatically given access to the application. After completing this procedure, you will need to grant users access to the application (see next set of instructions).

1. From the dashboard, click the **Manage Applications** link.
2. The Manage Applications screen appears with a list of active applications. Select from the Active Applications list **Enterprise Customer Relationship Management** to be added to the user group's list of Available Applications. Then, click the **Available User Groups** tab.
3. Select the user group you wish to add to an application. Then click **Manage Access**.



Note: If you do not see Enterprise Customer Relationship Management listed under “Available Applications” please review the [Set Up an Available Application](#) job aid.

4. The Set Up Application screen appears. In the **Available Data Folders** pane, select the data folder(s) you wish to assign to the user group, then click the **Add Arrow** button.
5. The selected data folder(s) will be added to the Granted Data Folders pane. Click **Save Changes** to save the changes made.




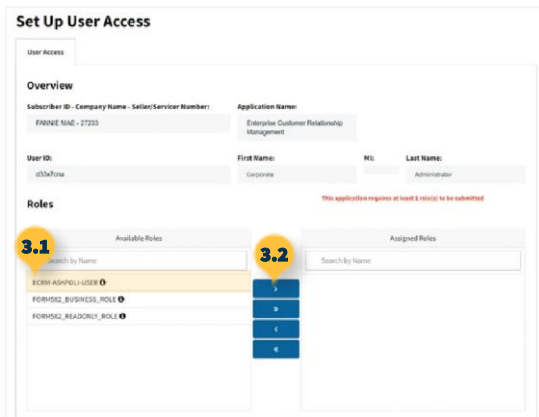


Granting a User Access to the Ask Poli Role

Note: Before assigning user access to the Ask Poli role and ECRM application, Corporate Administrators will need to verify that they have set up the ECRM application for their organization and granted user group access to the ECRM application. For more instructions, please review the Set Up an Available Application job aid and the Grant a User Group Access to an Application job aid.

Review the [Grant a User Access to an Application](#) job aid for a more detailed explanation on how to enable a user's access to a specific Fannie Mae Technology application using the traditional Technology Manager process.

1. Select the desired user record. The profile Information for the selected user record appears. Click the **Available Applications** tab.
2. Select the *Enterprise Customer Relationship Management* application to assign to the user, then click **MANAGE ACCESS**.
3. The Set Up User Access screen appears. In the Roles section, select *ECRM-ASKPOLI-USER*, then click the **Add Arrow** button. 



Set Up User Access

User Access

Overview

Subscriber ID - Company Name - Seller/Service Number: FANNIE MAE - 27233

Application Name: Enterprise Customer Relationship Management

User ID: 0534796 First Name: Corporate MI: Last Name: Administrator

Roles

This application requires at least 1 role(s) to be submitted

Available Roles

Search By Name

ECRM-ASKPOLI-USER

ECRM-BUSINESS_ROLE

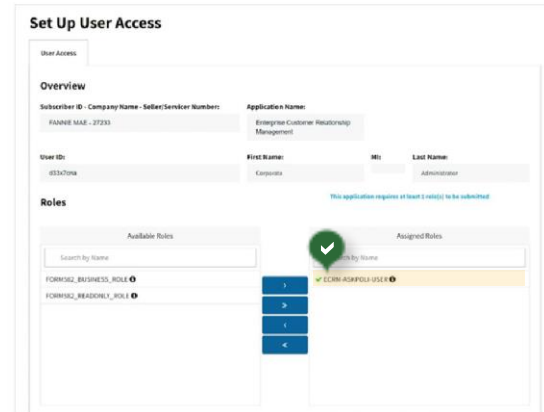
ECRM-READONLY_ROLE

Assigned Roles

Search By Name

3.1

3.2



Set Up User Access

User Access

Overview

Subscriber ID - Company Name - Seller/Service Number: FANNIE MAE - 27233

Application Name: Enterprise Customer Relationship Management

User ID: 0534796 First Name: Corporate MI: Last Name: Administrator

Roles

This application requires at least 1 role(s) to be submitted

Available Roles

Search By Name


ECRM-BUSINESS_ROLE

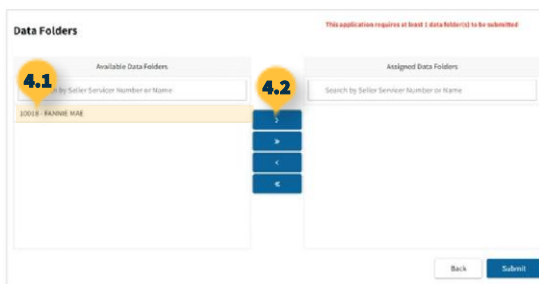
ECRM-READONLY_ROLE

Assigned Roles

Search By Name

✓ ECRM-ASKPOLI-USER

4. In the Data Folder section, select the data folder(s) the user will be able to access, then click the **Add Arrow** button. 



Data Folders

This application requires at least 1 data folder(s) to be submitted

Available Data Folders

Search By Seller/Service Number or Name

10014 - FANNIE MAE

Assigned Data Folders

Search By Seller/Service Number or Name

4.1

4.2



Data Folders

This application requires at least 1 data folder(s) to be submitted

Available Data Folders

Search By Seller/Service Number or Name

Assigned Data Folders

Search By Seller/Service Number or Name

✓ 10014 - FANNIE MAE

5. Click **SUBMIT**.
6. A confirmation window appears. Click **CONTINUE** to save your changes.

Note: Once the Corporate Admin assigns the Ask Poli role to a user, it may take **up to 24 hours** for provisioning to complete in Salesforce and content to be available in Ask Poli.



Frequently Asked Questions

Q1

Why do users have to log in with a Fannie Mae User ID and password?

Fannie Mae is committed to information security best practices. Consistent with other Fannie Mae applications, a FM User ID and password are required to access Ask Poli as of April 23, 2024.

Q2

What is a System ID? What is a User ID?

System IDs are intended to be used for application-to-application integrations and should not be used to access the user interface of a Fannie Mae application. A User ID allows a single end user to access a Fannie Mae application. Learn more on the [Technology Manager Job Aid](#).

Q3

How can I easily create more than one User ID?

The [Technology Manager Virtual Assistant](#) can create up to five new User IDs in one session as well as copy one user's application and role access to another user's profile. Access the Virtual Assistant by clicking the icon in the bottom right-hand corner of your Technology Manager dashboard.

Q4

How long does it take for a user to gain access to Ask Poli after the role is assigned?

Once Corporate Admin assigns the Ask Poli role to a user, it may take up to 24 hours for provisioning to complete in Salesforce and for the content to become available in Ask Poli.

Q5

Who do I contact if I have questions?

The Technology Support Center is available to answer questions related to Fannie Mae technology applications and can be reached at 1-800-2FANNIE (1-800-232-6643).

Troubleshooting and Support

The Technology Support Center is the primary point of contact for Fannie Mae customers seeking information on or assistance with Fannie Mae technology applications. Reach out to us via phone or web chat using the links below, or try using our online search to answer your question.

Please note that the Web Chat link is only available to registered technology application users.



Call us at 1-800-2FANNIE
(1-800-232-6643)



[Open a Web Chat →](#)