

Can I adjust the broker fee?

Yes you can. You will find a broker admin fee slider at the top of the results page which you can amend. You will need to click the 'show slider' button at the top of the page. (This only applies to on account brokers.)

How do I find my documentation?

Once you have selected the relevant insurer, click 'proceed' and the documentation shall appear on the next page.
If you'd like to view the full wording for the endorsements, click 'proceed'.

How do I find my statements?

Once you have logged into your online portal, the Statements tab will be shown on the portal home page. When selected, you then have the option to download your latest statements and these are updated on the 25th of every month.

How do I find my Quote reference number?

Look at the top or bottom of your quote, you will see a long number that starts with the two last digits of the year we are in i.e. if we are in the year 2021, then the first two digits will be 21. This can also be found at the top of the Quote Illustration print out, which is the following page after the results page.

How do I save my quote?

There is no 'save' button to do this. For the quote to be saved you must select 'next' when you have completed filling the information on a page. Once you have reached the results page, quotes are valid of 30 days.

How do I relocate a quote?

If it is a recent quote, it will be found under 'Recent Quotes' in your dashboard. This is where you'll find the last 10 of your quotes. If you are looking for an older quote click to the "Search Quotes" tab through the home page. Clicking on this, you have the option to search using the Quote Reference obtained, or by using the clients surname, Correspondence Postcode or Email.

Where is my renewal?

You will receive an email prompting renewals. You can also search for renewals within the portal. Click to 'Search Renewals' when on the home page to do this.



What do I do when I've forgotten my login password?

When logging into Ceta portal

Give us a call on 01608 647888 and we will either run through security questions with you and advise you on your Membership Number and PIN number, or we will provide you with a new PIN Number.

When logging into Infinity portal

There is a standard 'reset password' option at the login page. Click this and follow the steps. You will be sent an email containing a link where you can choose a new password. To simply change your password, click to 'My Account' and 'Change Password'.

How do I find my membership login?

This will be found in your emails once you have completed registration with us. If you are using the Ceta Portal, you will use your membership number to login.

What is the difference between an Admin user and a Standard user?

A standard user can only do quotes. An administrator has the ability to access statements, add new users, as well as run new quotes.

How do I add a new user?

Firstly, you must be an Admin user. Once you are logged into the Portal and on the dashboard, there will be a grey column down the left hand side of your screen. If you select Administration, this will then provide you with the option to 'Register New Agent'. Once this is selected, it will ask you for the new agents details, then select Register. The new agent will receive login emails to the email account registered against them.

How are on account brokers and off account brokers different?

If you are an on account broker, you will only have access to the insurers directly on our quotation system. If you are an off account broker, you will have the option for us to quote off panel if required.

There is also a difference in method of payment. As on account brokers, you have your own payment methods. You get paid by your client and we then request the money excluding your commission by invoice each month.

If you are an off account broker, you'll use our payment facility. We take the money in full or by direct debit and then we pay commission each month.



How do I add 'add ons'?

Only off account brokers can do this. You will have the option to add these at the basket stage.

What does HMO mean?

You may come across this acronym when it comes to doing portfolios. It stands for House in Multiple Occupation, meaning a property rented out by at least 3 people who are not from one household.