鑫能计划书接口文档

## 创建计划书（进入计划书制作页创建计划书）

/plan/createPlan

### 请求

|  |
| --- |
| {  "commodityId": "HQL00100",  "companyId": "hq"  } |

|  |  |  |  |
| --- | --- | --- | --- |
| **字段** | **中文解释** | **必填** | **备注** |
| commodityId | 产品ID | Y | 产品列表所选产品的ID |
| companyId | 公司ID | Y | 产品列表所选产品公司的ID |

### 返回

成功返回

|  |
| --- |
| {  "errorMsg": "",  "errorCode": "",  "value": {  "planId": "15084701430746090184971400797425",  "commodityList": [  {  "commodityId": "HQL00100",  "companyId": "hengqin",  "engineProductId": "1508470143074\_123\_M0",  "productCode": "16010",  "name": "横琴优健人生终身重大疾病保险",  "abbrName": "优健人生",  "riskType": "main",  "hasRider": false,  "paramList": [  {  "inputType": "select",  "label": "交费期间",  "key": "pay",  "itemList": [  {  "key": "single",  "value": "一次交清"  },  {  "key": "term\_5",  "value": "5年期"  },  {  "key": "term\_10",  "value": "10年期"  },  {  "key": "term\_15",  "value": "15年期"  },  {  "key": "term\_20",  "value": "20年期"  },  {  "key": "term\_30",  "value": "30年期"  }  ],  "value": "term\_20",  "canEdit": true  },  {  "inputType": "select",  "label": "交费频次",  "key": "pay\_freq",  "itemList": [  {  "key": "single",  "value": "一次交清"  },  {  "key": "year",  "value": "年交"  }  ],  "value": "year",  "canEdit": true  },  {  "inputType": "select",  "label": "保险期间",  "key": "insure",  "itemList": [  {  "key": "to\_full",  "value": "终身"  }  ],  "value": "to\_full",  "canEdit": true  },  {  "inputType": "input",  "label": "保险金额",  "key": "amount",  "itemList": null,  "value": "0.00",  "canEdit": true  }  ],  "premium": null,  "amount": null,  "payDesc": "20年期",  "insureDesc": "终身"  }  ],  "firstPremium": "0.0"  },  "success": true  } |

失败返回

|  |
| --- |
| {  "errorMsg": "初始化计划书失败",  "errorCode": "null",  "success": false  } |

字段说明

|  |  |  |  |
| --- | --- | --- | --- |
| **key** | **中文解释** | **必填** | **备注** |
| success | 是否成功 | Y | true、false |
| errorCode | 错误代码 | N |  |
| errorMsg | 错误描述 | N |  |
|  |  |  |  |
| planId | 计划书id | Y |  |
| applicant | 投保人对象 | Y |  |
| insured | 被保人对象 | Y |  |
| firstPremium | 首期保费合计 | Y |  |
| totalPremium | 总保费 | Y |  |
| productList | 产品信息 | Y | 包含主附险 |
| commodityId | 产品id | Y |  |
| companyId | 企业id | Y |  |
| productCode | 产品code | Y |  |
| engineProductId | 引擎险种id | Y |  |
| hasRider | 是否有附加险 | Y | Boolean |
| name | 产品名称 | N |  |
| addrName | 产品简称 | Y |  |
| premium | 首期保费 | Y |  |
| riskType | 险种类型 | Y | main/rider |
| paramList | 产品配置 | Y |  |
| inputType | 展示形式 | Y | input/select |
| label | 配置文字描述 | Y |  |
| key | 配置标识 | Y |  |
| value | 配置value | Y |  |
| canEdit | 是否可编辑 | Y | Boolean |
| itemList | 配置选项内容 | Y |  |
| key | 配置code | Y |  |
| value | 文字描述desc | Y |  |

## 编辑计划书（当投被保人录入完整，修改投被保人时调用，根据操作对象传相应节点即可）

/plan/editPlan

### 请求

|  |
| --- |
| 1. { 2. "planId":"15084701430746090184971400797425", 3. "applicant":{ 4. "name":"测试", 5. "gender":"M", 6. "birthday":"1980-03-09", 7. "occupation":{ 8. "key":"1010001", 9. "value":"工人" 10. }, 11. "relation":{ 12. "key":"00", 13. "value":"本人" 14. } 15. }, 16. "insurant":{ 17. "name":"测试", 18. "gender":"F", 19. "birthday":"1980-03-09", 20. "occupation":{ 21. "key":"1010001", 22. "value":"工人" 23. } 24. } 25. } |

|  |  |  |  |
| --- | --- | --- | --- |
| **字段** | **中文解释** | **必填** | **备注** |
| planId | 计划书ID | Y |  |
| applicant | 投保人 | N | 编辑投保人时 |
| insurant | 被保人 | N | 编辑被保人时 |

### 1.2.2 返回

成功返回

|  |
| --- |
| {  "errorMsg": "",  "errorCode": "",  "value": {  "planId": "15084701430746090184971400797425",  "applicant": {  "customerId": null,  "name": "测试",  "gender": "M",  "birthday": "1980-03-09",  "relation": {  "key": "00",  "value": "本人"  },  "occupation": {  "key": "1010001",  "value": "工人"  },  "custType": null,  "certType": null,  "certNo": null,  "certValidate": null,  "citizenship": null,  "socialInsurance": null,  "marrige": null,  "degree": null,  "companyName": null,  "mobile": null,  "telphone": null,  "email": null,  "addrDTO": null,  "zipcode": null,  "salary": null,  "creator": null,  "gmtCreated": null,  "modifier": null,  "gmtModified": null  },  "insurant": {  "customerId": null,  "name": "测试",  "gender": "F",  "birthday": "1980-03-09",  "relation": null,  "occupation": {  "key": "1010001",  "value": "工人"  },  "custType": null,  "certType": null,  "certNo": null,  "certValidate": null,  "citizenship": null,  "socialInsurance": null,  "marrige": null,  "degree": null,  "companyName": null,  "mobile": null,  "telphone": null,  "email": null,  "addrDTO": null,  "zipcode": null,  "salary": null,  "creator": null,  "gmtCreated": null,  "modifier": null,  "gmtModified": null  },  "commodityList": [  {  "commodityId": "HQL00100",  "companyId": "hengqin",  "engineProductId": "1508470143074\_123\_M0",  "productCode": "16010",  "name": "横琴优健人生终身重大疾病保险",  "abbrName": "优健人生",  "riskType": "main",  "hasRider": false,  "paramList": [  {  "inputType": "select",  "label": "交费期间",  "key": "pay",  "itemList": [  {  "key": "single",  "value": "一次交清"  },  {  "key": "term\_5",  "value": "5年期"  },  {  "key": "term\_10",  "value": "10年期"  },  {  "key": "term\_15",  "value": "15年期"  },  {  "key": "term\_20",  "value": "20年期"  },  {  "key": "term\_30",  "value": "30年期"  }  ],  "value": "term\_20",  "canEdit": true  },  {  "inputType": "select",  "label": "交费频次",  "key": "pay\_freq",  "itemList": [  {  "key": "single",  "value": "一次交清"  },  {  "key": "year",  "value": "年交"  }  ],  "value": "year",  "canEdit": true  },  {  "inputType": "select",  "label": "保险期间",  "key": "insure",  "itemList": [  {  "key": "to\_full",  "value": "终身"  }  ],  "value": "to\_full",  "canEdit": true  },  {  "inputType": "input",  "label": "保险金额",  "key": "amount",  "itemList": null,  "value": "0.00",  "canEdit": true  }  ],  "premium": "0.00",  "amount": "0.00",  "payDesc": "20年期",  "insureDesc": "终身"  }  ],  "firstPremium": "0.0"  },  "success": true  } |

失败返回

|  |
| --- |
| {  "errorMsg": "修改计划书失败",  "errorCode": "null",  "success": false  } |

字段说明

|  |  |  |  |
| --- | --- | --- | --- |
| **key** | **中文解释** | **必填** | **备注** |
| success | 是否成功 | Y | true、false |
| errorCode | 错误代码 | N |  |
| errorMsg | 错误描述 | N |  |
|  |  |  |  |
| planId | 计划书id | Y |  |
| applicant | 投保人对象 | Y |  |
| name | 姓名 | Y |  |
| gender | 性别 | Y | 女：F 男：M |
| birthday | 出生日期 | Y |  |
| occupation | 职业编码 | Y |  |
| occupationDesc | 职业描述 | Y |  |
| relation | 与被保人关系 | Y |  |
| insured | 被保人对象 | Y | 字段同投保人 |
| firstPremium | 首期保费合计 | Y |  |
| totalPremium | 总保费 | Y |  |
| productList | 产品信息 | Y | 包含主附险 |
| commodityId | 产品id | Y |  |
| companyId | 企业id | Y |  |
| productCode | 产品code | Y |  |
| engineProductId | 引擎险种id | Y |  |
| hasRider | 是否有附加险 | Y | Boolean |
| name | 产品名称 | N |  |
| addrName | 产品简称 | Y |  |
| premium | 首期保费 | Y |  |
| riskType | 险种类型 | Y | main/rider |
| paramList | 产品配置 | Y |  |
| inputType | 展示形式 | Y | input/select |
| label | 配置文字描述 | Y |  |
| key | 配置标识 | Y |  |
| value | 配置value | Y |  |
| canEdit | 是否可编辑 | Y | Boolean |
| itemList | 配置选项内容 | Y |  |
| key | 配置code | Y |  |
| value | 文字描述desc | Y |  |

## 1.3编辑产品（编辑产品配置或者录入保额/保费时调用）

/plan/ editCommodity

### 1.3.1请求

|  |
| --- |
| {     "planId":"15084701430746090184971400797425",     "editPropety":{         "commodityId":"HQL00100",         "parentCommodityId":"",         "amount":"100"     } } |

|  |  |  |  |
| --- | --- | --- | --- |
| **字段** | **中文解释** | **必填** | **备注** |
| planId | 计划书ID | Y |  |
| editPropety | 编辑产品 | Y |  |
| commodityId | 产品ID | Y | 编辑险种的ID |
| parentCommodityId | 父险ID | N | 编辑附加险时使用 |
| amount | 保额 | N | key为paramList中每个属性对应的key，value为属性编辑后的value  例如修改产品交费 期间为五年期："pay":"term\_5" |
| premium | 保费 | N |
| quantity | 份数 | N |
| rank | 档次 | N |
| payFreq | 交费频次 | N |
| pay | 交费期间 | N |
| insure | 保险期间 | N |

### 1.3.2 返回

成功返回

|  |
| --- |
| {  "errorMsg": "",  "errorCode": "",  "value": {  "planId": "15084701430746090184971400797425",  "applicant": {  "customerId": null,  "name": "测试",  "gender": "M",  "birthday": "1980-03-09",  "relation": {  "key": "00",  "value": "本人"  },  "occupation": {  "key": "1010001",  "value": "工人"  },  "custType": null,  "certType": null,  "certNo": null,  "certValidate": null,  "citizenship": null,  "socialInsurance": null,  "marrige": null,  "degree": null,  "companyName": null,  "mobile": null,  "telphone": null,  "email": null,  "addrDTO": null,  "zipcode": null,  "salary": null,  "creator": null,  "gmtCreated": null,  "modifier": null,  "gmtModified": null  },  "insurant": {  "customerId": null,  "name": "测试",  "gender": "F",  "birthday": "1980-03-09",  "relation": null,  "occupation": {  "key": "1010001",  "value": "工人"  },  "custType": null,  "certType": null,  "certNo": null,  "certValidate": null,  "citizenship": null,  "socialInsurance": null,  "marrige": null,  "degree": null,  "companyName": null,  "mobile": null,  "telphone": null,  "email": null,  "addrDTO": null,  "zipcode": null,  "salary": null,  "creator": null,  "gmtCreated": null,  "modifier": null,  "gmtModified": null  },  "commodityList": [  {  "commodityId": "HQL00100",  "companyId": "hengqin",  "engineProductId": "1508470143074\_123\_M0",  "productCode": "16010",  "name": "横琴优健人生终身重大疾病保险",  "abbrName": "优健人生",  "riskType": "main",  "hasRider": false,  "paramList": [  {  "inputType": "select",  "label": "交费期间",  "key": "pay",  "itemList": [  {  "key": "single",  "value": "一次交清"  },  {  "key": "term\_5",  "value": "5年期"  },  {  "key": "term\_10",  "value": "10年期"  },  {  "key": "term\_15",  "value": "15年期"  },  {  "key": "term\_20",  "value": "20年期"  },  {  "key": "term\_30",  "value": "30年期"  }  ],  "value": "term\_20",  "canEdit": true  },  {  "inputType": "select",  "label": "交费频次",  "key": "pay\_freq",  "itemList": [  {  "key": "single",  "value": "一次交清"  },  {  "key": "year",  "value": "年交"  }  ],  "value": "year",  "canEdit": true  },  {  "inputType": "select",  "label": "保险期间",  "key": "insure",  "itemList": [  {  "key": "to\_full",  "value": "终身"  }  ],  "value": "to\_full",  "canEdit": true  },  {  "inputType": "input",  "label": "保险金额",  "key": "amount",  "itemList": null,  "value": "100.00",  "canEdit": true  }  ],  "premium": "3.63",  "amount": "100.00",  "payDesc": "20年期",  "insureDesc": "终身"  }  ],  "ruleList": [  {  "productName": "横琴优健人生终身重大疾病保险",  "failList": [  {  "level": 102,  "desc": "最低投保基本保险金额：10000 元，超出部分须为 1000 元的整数倍。"  }  ],  "alertList": null  }  ],  "firstPremium": "3.63"  },  "success": true  } |

失败返回

|  |
| --- |
| {  "errorMsg": "修改产品失败",  "errorCode": "null",  "success": false  } |

字段说明

|  |  |  |  |
| --- | --- | --- | --- |
| **key** | **中文解释** | **必填** | **备注** |
| success | 是否成功 | Y | true、false |
| errorCode | 错误代码 | N |  |
| errorMsg | 错误描述 | N |  |
|  |  |  |  |
| planId | 计划书id | Y |  |
| applicant | 投保人对象 | Y |  |
| name | 姓名 | Y |  |
| gender | 性别 | Y | 女：F 男：M |
| birthday | 出生日期 | Y |  |
| occupation | 职业编码 | Y |  |
| occupationDesc | 职业描述 | Y |  |
| relation | 与被保人关系 | Y |  |
| insured | 被保人对象 | Y | 字段同投保人 |
| firstPremium | 首期保费合计 | Y |  |
| totalPremium | 总保费 | Y |  |
| ruleList | 产品规则 | N |  |
| productName | 产品名称 | N |  |
| failList | 触发规则清单 | N |  |
| level | 规则等级 | N | 提示规则：101 block规则：102 |
| desc | 规则描述 | N |  |
| productList | 产品信息 | Y | 包含主附险 |
| commodityId | 产品id | Y |  |
| companyId | 企业id | Y |  |
| productCode | 产品code | Y |  |
| engineProductId | 引擎险种id | Y |  |
| hasRider | 是否有附加险 | Y | Boolean |
| name | 产品名称 | N |  |
| addrName | 产品简称 | Y |  |
| premium | 首期保费 | Y |  |
| riskType | 险种类型 | Y | main/rider |
| paramList | 产品配置 | Y |  |
| inputType | 展示形式 | Y | input/select |
| label | 配置文字描述 | Y |  |
| key | 配置标识 | Y |  |
| value | 配置value | Y |  |
| canEdit | 是否可编辑 | Y | Boolean |
| itemList | 配置选项内容 | Y |  |
| key | 配置code | Y |  |
| value | 文字描述desc | Y |  |

## 1.4加载计划书

/plan/loadPlan

### 1.4.1请求

|  |
| --- |
| {     "planId":"1101618440411449"  } |

|  |  |  |  |
| --- | --- | --- | --- |
| **字段** | **中文解释** | **必填** | **备注** |
| planId | 计划书ID | Y |  |

### 1.4.2 返回

成功返回

|  |
| --- |
| {     "errorMsg":"",     "errorCode":"",     "pageNum":null,     "pageSize":null,     "totalNum":null,     "totalPage":null,     "value":{         "planId":"1101618440411449",         "applicant":{             "name":"测试",             "gender":"M",             "birthday":"1980-03-09",             "occupation":{                 "key":"1010001",                 "value":"工人"             },             "relation":{                 "key":"00",                 "value":"本人"             }         },         "insurant":{             "name":"测试",             "gender":"F",             "birthday":"1980-03-09",             "occupation":{                 "key":"1010001",                 "value":"工人"             }         },         "firstPremium":"282",         "totalPremium":"282",         "productList":[             {                 "commodityId":"HQL00100",                 "productCode":"16010",                 "companyId":"hq",                 "engineProductId":"1505795759701\_5757\_M0",                 "name":"横琴优健人生终身重大疾病保险",                 "addrName":"优健人生",                 "riskType":"main",                 "hasRider":true,                 "premium":"282",                 "amount":"10000",                 "paramList":[                     {                         "inputType":"select",                         "label":"交费频次",                         "key":"payFreq",                         "value":"single",                         "canEdit":true,                         "itemList":[                             {                                 "key":"single",                                 "value":"一次交清"                             },                             {                                 "key":"year",                                 "value":"年交"                             }                         ]                     },                     {                         "inputType":"select",                         "label":"交费期间",                         "key":"pay",                         "value":"single",                         "canEdit":true,                         "itemList":[                             {                                 "key":"single",                                 "value":"一次交清"                             },                             {                                 "key":"term\_5",                                 "value":"5年期"                             }                         ]                     },                     {                         "inputType":"select",                         "label":"保险期间",                         "key":"insure",                         "value":"to\_full",                         "canEdit":true,                         "itemList":[                             {                                 "key":"to\_full",                                 "value":"终身"                             }                         ]                     },                     {                         "inputType":"input",                         "label":"保险金额",                         "key":"amount",                         "value":"10000",                         "canEdit":true                     }                 ]             }         ]     },     "success":true } |

失败返回

|  |
| --- |
| {  "errorMsg": "加载计划书失败",  "errorCode": "null",  "pageNum": null,  "pageSize": null,  "totalNum": null,  "totalPage": null,  "value": null,  "success": false  } |

字段说明

|  |  |  |  |
| --- | --- | --- | --- |
| **key** | **中文解释** | **必填** | **备注** |
| success | 是否成功 | Y | true、false |
| errorCode | 错误代码 | N |  |
| errorMsg | 错误描述 | N |  |
|  |  |  |  |
| planId | 计划书id | Y |  |
| applicant | 投保人对象 | Y |  |
| name | 姓名 | Y |  |
| gender | 性别 | Y | 女：F 男：M |
| birthday | 出生日期 | Y |  |
| occupation | 职业编码 | Y |  |
| occupationDesc | 职业描述 | Y |  |
| relation | 与被保人关系 | Y |  |
| insured | 被保人对象 | Y | 字段同投保人 |
| firstPremium | 首期保费合计 | Y |  |
| totalPremium | 总保费 | Y |  |
| productList | 产品信息 | Y | 包含主附险 |
| commodityId | 产品id | Y |  |
| companyId | 企业id | Y |  |
| productCode | 产品code | Y |  |
| engineProductId | 引擎险种id | Y |  |
| hasRider | 是否有附加险 | Y | Boolean |
| name | 产品名称 | N |  |
| addrName | 产品简称 | Y |  |
| premium | 首期保费 | Y |  |
| riskType | 险种类型 | Y | main/rider |
| paramList | 产品配置 | Y |  |
| inputType | 展示形式 | Y | input/select |
| label | 配置文字描述 | Y |  |
| key | 配置标识 | Y |  |
| value | 配置value | Y |  |
| canEdit | 是否可编辑 | Y | Boolean |
| itemList | 配置选项内容 | Y |  |
| key | 配置code | Y |  |
| value | 文字描述desc | Y |  |

## 1.5预览计划书

/plan/previewPlan

### 1.5.1 请求

|  |
| --- |
| {  "planId": "1101618440411449"  } |

|  |  |  |  |
| --- | --- | --- | --- |
| **字段** | **中文解释** | **必填** | **备注** |
| planId | 计划书ID | Y |  |

### 1.5.2 返回

成功返回



失败返回

|  |
| --- |
| {  "errorMsg": "预览计划书失败",  "errorCode": "null",  "success": false  } |

字段说明

|  |  |  |  |
| --- | --- | --- | --- |
| **key** | **中文解释** | **必填** | **备注** |
| success | 是否成功 | Y | true、false |
| errorCode | 错误代码 | N |  |
| errorMsg | 错误描述 | N |  |
|  |  |  |  |
| planId | 计划书id | Y |  |
| applicant | 投保人对象 | Y |  |
| name | 姓名 | Y |  |
| gender | 性别 | Y | 女：F 男：M |
| birthday | 出生日期 | Y |  |
| occupation | 职业编码 | Y |  |
| occupationDesc | 职业描述 | Y |  |
| relation | 与被保人关系 | Y |  |
| insured | 被保人对象 | Y | 字段同投保人 |
| firstPremium | 首期保费合计 | Y |  |
| totalPremium | 总保费 | Y |  |
| productList | 产品信息 | Y | 包含主附险 |
| commodityId | 产品id | Y |  |
| companyId | 企业id | Y |  |
| productCode | 产品code | Y |  |
| engineProductId | 引擎险种id | Y |  |
| hasRider | 是否有附加险 | Y | Boolean |
| name | 产品名称 | N |  |
| addrName | 产品简称 | Y |  |
| premium | 首期保费 | Y |  |
| riskType | 险种类型 | Y | main/rider |
| paramList | 产品配置 | Y |  |
| inputType | 展示形式 | Y | input/select |
| label | 配置文字描述 | Y |  |
| key | 配置标识 | Y |  |
| value | 配置value | Y |  |
| canEdit | 是否可编辑 | Y | Boolean |
| itemList | 配置选项内容 | Y |  |
| key | 配置code | Y |  |
| value | 文字描述desc | Y |  |
| mBenefit | 利益演示 | Y |  |
| startAge | 开始年龄 | Y |  |
| endAge | 结束年龄 | Y |  |
| tableDesc | 利益演示描述 | Y |  |
| tableTitle | 利益演示标题 | Y |  |
| tableData | 利益演示数据 | Y |  |
| mLiability | 保险责任 | Y |  |
| liabilityContentList | 保险责任项 | Y |  |
| title | 责任项标题 | Y |  |
| contentList | 保险责任项内容 | Y |  |
| head | 保险责任表格表头 | Y |  |
| body | 保险责任表格内容 | Y |  |
| type | 展示类型 | Y | table/text |
| text | 保险责任文字描述 | Y |  |