



Developer Guide | PUBLIC
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Runtime Services for Insurance Apps

SAP Quotation and Underwriting for Insurance 1.1

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1 Introduction

1.1 About this Document

The purpose of this document is to provide guidance on how to use the services that are delivered with the Runtime FS-QUO application.

1.2 Audience

This document is intended for use by technical consultants and developers who modify FS-QUO functionality.

The prerequisites for using this document are the following:

- You are familiar with FS-PRO.
- You have experience developing applications using UI5.

2 Substitution Variable Placeholders

The following table defines the substitution variables used in this guide

Substitution Variable	Description
<code><quo_app_url></code>	The URL to the FS-QUO approuter application.

3 Underwriting OData Model

Definition

This Entity Data Model (EDM) includes the OData model definition for underwriting.

Business Context and Use

This EDM provides OData models for underwriting systems.

Corresponding Project

The implementation of Underwriting OData services is based on Olingo.

Entity Types

The topics contained in this chapter indicate the available entity types.

Error Handling

For all methods of the entity types above, in case of failure, the methods return the following information to the UI:

- The main error messages from the failed associated by Java library: Olingo
- The individual error categories from the failed associated by Java library: Olingo
- The following OData error message categories:
 - Technical exceptions: could be errors of service communication or missing parameters.
 - Business exceptions: error messages from the back-end system concerning the issue.

3.1 Account

Definition

This entity type represents an account.

Business Context and Use

This entity type provides the basic set of properties that define an account.

Associated SOA Operations

Not applicable

Implemented Methods

Account - Get Entity Set

Use this method to get a set of accounts. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://://<quo_app_url>/uw/odata.svc/Accounts</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none">• AccountId• AccountName• FirstName• MiddleName• LastName
Sorting	The following properties can be used for sorting: <ul style="list-style-type: none">• AccountId• AccountName• FirstName• MiddleName• LastName

Use of the Method

To get this data, add the following fragment to the request URL used by the HTTP Get method:

```
/Accounts?$filter=(AccountName=<>)
```

3.2 Activity Log

Definition

This entity type represents an activity log.

Business Context and Use

This entity type provides the basic set of properties that define an activity log.

Associated SOA Operations

Not applicable

Implemented Methods

Activity Log - Get Entity Set

Use this method to get a set of activity logs. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/ActivityLogs</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- Id
 - Description
 - Comment
 - Category
 - ActivityOperatedId
 - ActivityLogType
 - ActivityOperatedType
 - CaseId
 - CaseItemId
 - CurrentCase
 - Id
 - ApplicationNumber
 - CaseItem
 - Id
 - Name
 - CreatedOn
 - CreatedBy
 - UserId
 - FirstName
 - LastName
-

Sorting

The following properties can be used for sorting:

- Id
- Description
- Comment
- Category
- ActivityOperatedId
- ActivityLogType
- ActivityOperatedType
- CaseId
- CaseItemId
- CurrentCase
 - Id
 - ApplicationNumber
- CaseItem
 - Id
 - Name
- CreatedOn
- CreatedBy
 - UserId
 - FirstName
 - LastName

ⓘ Note

If the activity log is at case item level, the `CaseItemId` will be the specific case item ID. Otherwise it will be zero.

Use of the Method

To get a set of activity logs, add the following fragment to the request URL used by the HTTP Get method:

```
/ActivityLogs?$filter=(ActivityLogType=<>)
```

ⓘ Note

This is just an example. You can use other properties as needed.

3.3 Case

Definition

This entity type represents an underwriting case.

Business Context and Use

This entity type provides the basic set of properties that define an underwriting case.

Associated SOA Operations

Not applicable

Implemented Methods

Case - Get Entity Set

Use this method to get a set of cases. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/Cases</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- Id
 - GroupCaseId
 - GroupAgreementId
 - ApplicationNumber
 - Source
 - Currency
 - PolicyQuoteOptionId
 - NewPrem
 - ViolationCount
 - UnderwritingGroup
 - TransactionId
 - Version
 - CaseReferral
 - Id
 - ReferredPremium
 - ProductCode
 - ProductName
 - ProductVersion
 - SystemUwDetail
 - ExecutionId
 - DecisionComment
 - CreatedOn
 - CreatedBy
 - UserId
 - FirstName
 - LastName
 - UpdatedBy
 - UserId
 - FirstName
 - LastName
 - UpdatedOn
 - Producer
 - ProducerCode
 - ProducerName
 - ProducerContact
 - Id
 - Title
 - FirstName
 - LastName
 - Customer
 - AccountId
-

- FirstName
 - LastName
 - Owner
 - UserId
 - FirstName
 - LastName
-

Sorting

The following properties can be used for sorting:

- Id
- GroupCaseId
- GroupAgreementId
- ApplicationNumber
- Source
- Currency
- PolicyQuoteOptionId
- NewPrem
- ViolationCount
- UnderwritingGroup
- TransactionId
- Version
- CaseReferral
 - Id
 - ReferredPremium
 - ProductCode
 - ProductName
 - ProductVersion
 - SystemUwDetail
 - ExecutionId
- DecisionComment
- CreatedOn
- CreatedBy
 - UserId
 - FirstName
 - LastName
- UpdatedBy
 - UserId
 - FirstName
 - LastName
- UpdatedOn
- Producer
 - ProducerCode
 - ProducerName
- ProducerContact
 - Id
 - Title
 - FirstName
 - LastName
- Customer
 - AccountId

- FirstName
- LastName
- Owner
 - UserId
 - FirstName
 - LastName

Use of the Method

To get a set of cases, add the following fragment to the request URL used by the HTTP Get method:

```
/Cases?$filter=(CreatedOn GT <> LT<> and Source=<>)
```

Case - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/Cases(<Case ID>)$expand=CaseReferral,CaseStatus
```

Case - Get Entity

Use this method to get the details of a case.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/Cases(<Case ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a case, add the following fragment to the request URL used by the HTTP Get method:

```
/Cases(<Case ID>)
```

Case - Update Entity

Use this method to update a case.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/Cases(<Case ID>)</code>
----------------	---

Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Fields updated: <ul style="list-style-type: none"> • Decision <ul style="list-style-type: none"> • Code • DecisionReason <ul style="list-style-type: none"> • Code • DecisionComment
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update a case, add the following fragment to the request URL used by the HTTP Patch method:

`/Cases(<Case ID>)`

Prerequisites

The case status is *In Process*.

Case - Process Case - Function Imports

Use this method to set the login user as the owner of a case, and change its status from *Unassigned* to *In Process*.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/ProcessCase</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Fields updated: <ul style="list-style-type: none"> • Owner • CaseStatus
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To process a case, add the following fragment to the request URL used by the HTTP Post method:

`/ProcessCase`

Prerequisites

The case status is *Unassigned*.

Case - Reassign Case - Function Imports

Use this method to reassign a case to a user.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/ReassignCase</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Records created: <ul style="list-style-type: none">UW_CASE_REASSIGN_HISTORY Fields updated: <ul style="list-style-type: none">UW_CASE.OWNER
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To reassign a case, add the following fragment to the request URL used by the HTTP Post method:

`/ReassignCase`

Prerequisites

- The case status is *In Process*.
- The `case ID`, `assigner ID` and `assignee ID` are provided.

Case - Tiles - Function Imports

Use this method to count the number of cases of each status type.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/Tiles</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To count the number of cases of each status type, add the following fragment to the request URL used by the HTTP Get method:

/Tiles

Case - Pre-check Application Decision - Function Imports

Use this method to pre-check if the users can accept, decline, or reassign specific cases.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/preCheckApplicationDecision</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To pre-check if the users can accept, decline, or reassign specific cases, add the following fragment to the request URL used by the HTTP Post Method:

/preCheckApplicationDecision

Prerequisites

The syntax of the parameters from HTTP POST Request is:

```
[{
  massDecision: true,
  objectId : group case id,
  objectType : 'Application',
  decisionCode : 'ACCEPTED'
}]
```

Case - Underwriting Application eApp Name - Function Imports

Use this method to get the eApp name of an underwriting application from Product Content with a specific submission ID.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/ UnderwritingApplicationeAppName</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable

Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the eApp name of an underwriting application from Product Content with specified case ID, add the following fragment to the request URL used by the HTTP Post method:

```
/UnderwritingApplicationeAppName?SubmissionId=<Submission Id>
```

Case - Mass Reassign Cases - Function Imports

Use this method to set a user as the owner of selected cases, and change the status of the group member case from *Unassigned* to *In Process*.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/massReassignCase</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Field updates: <ul style="list-style-type: none"> • Owner • CaseStatus
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To process the selected cases, add the following fragment to the request URL used by the HTTP Post Method:

```
/massReassignCase
```

Prerequisites

- The case status is *Unassigned*.

The syntax of the parameters from HTTP POST Request is:

```
[ {
  AssigneeId: "UserId",
  CaseId: '<CaseId>,<CaseId>,...',
} ]
```

Case - Mass Make Decision - Function Imports

Use this method to submit the final decisions on underwriting cases and change their statuses to final statuses.

Technical Data

Technical Name	http://<quo_app_url>/uw/odata.svc/massMakeDecision
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Field updates: <ul style="list-style-type: none"> • CaseStatus • Decision • DecisionReason • DecisionComment
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To submit specific group member cases, add the following fragment to the request URL used by the HTTP Post method:

```
/massMakeDecision
```

Prerequisites

- The case status is *In Process*.
- The decision on the case is not *Accepted* or *Declined*.
- The decision on the case item has no constrains.

The syntax of the parameters from HTTP POST Request is:

```
[{
  massDecision: true,
  objectType: 'Application',
  objectId: CaseId,
  decisionCode: 'ACCEPTED',
  decisionReasonId: Decision reason ID,
  decisionComment: 'comments'
  originCounterOffer: false
},
{
  massDecision: true,
  objectType: 'Application',
  objectId: CaseId,
  decisionCode: 'ACCEPTED',
  decisionReasonId: Decision reason ID,
  decisionComment: 'comments'
  originCounterOffer: false
}]
```

Case - Pre-check Mass Reassign Case - Function Imports

Use this method to pre-check if specific cases can be reassigned.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/PreCheckMassReassignCase</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To pre-check if specific cases can be reassigned, add the following fragment to the request URL used by the HTTP Post method:

```
/PreCheckMassReassignCase
```

Prerequisites

The syntax of the parameters from HTTP POST Request is:

```
{
  CaseId: '<CaseId>,<CaseId>,...'
}
```

3.4 Case Check Item

Definition

This entity type represents an underwriting case check item.

Business Context and Use

This entity type provides the basic set of properties that define an underwriting case check item.

Associated SOA Operations

Not applicable

Implemented Methods

Case Check Item - Get Entity Set

Use this method to get a set of case check items. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CaseCheckItems</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	<p>The following properties can be used as filters:</p> <ul style="list-style-type: none">• Id• CaseId• Code• Name• Description• ExecutedId• RuleCategory• RuleLevel• ExecutedObjectId• ExecutedObjectType• ExecutedObjectName• RuleViolationCode• RuleViolationDesc• Reason• IsAdhoc• MandOption• IsReassigned• AssigneeId• Comments• StatusCode• StatusName• CreatedOn• CreatedBy<ul style="list-style-type: none">• UserId• FirstName• LastName• UpdatedBy<ul style="list-style-type: none">• UserId• FirstName• LastName• UpdatedOn

Sorting

The following properties can be used for sorting:

- Id
- CaseId
- Code
- Name
- Description
- ExecutedId
- RuleCategory
- RuleLevel
- ExecutedObjectId
- ExecutedObjectType
- ExecutedObjectName
- RuleViolationCode
- RuleViolationDesc
- Reason
- IsAdhoc
- MandOption
- IsReassigned
- AssigneeId
- Comments
- StatusCode
- StatusName
- CreatedOn
- CreatedBy
 - UserId
 - FirstName
 - LastName
- UpdatedBy
 - UserId
 - FirstName
 - LastName
- UpdatedOn

Use of the Method

To get a set of case check items, add the following fragment to the request URL used by the HTTP Get method:

```
/CaseCheckItems?$filter=(CreatedOn GT <> LT<> and MandOption =<>)
```

Case Check Item - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/CaseCheckItems(<Case Check Item ID>)$expand=UpdateBy
```

Case Check Item - Get Entity

Use this method to get the details of a case check item.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CaseCheckItems(<Case Check Item ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a case check item, add the following fragment to the request URL used by the HTTP Get method:

```
/CaseCheckItems(<Case Check Item ID>)
```

Case Check Item - Create Entity

Use this method to create a case check item.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CaseCheckItems</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Entity created: <ul style="list-style-type: none">• Case Check Item
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To create a case check item, add the following fragment to the request URL used by the HTTP Post method:

```
/CaseCheckItems
```

Case Check Item - Delete Entity

Use this method to delete a case check item.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CaseCheckItems(<Case Check Item ID>)</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Entity deleted: <ul style="list-style-type: none">• Case Check Item
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To delete a case check item, add the following fragment to the request URL used by the HTTP Delete method:

```
/CaseCheckItems(<Case Check Item ID>)
```

Case Check Item - Batch Delete Entity

Use this method to delete case check items in batches.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/\$batch?</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Entity deleted: <ul style="list-style-type: none">• one or more Case Check Item
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

The front end needs to use the ODataModel to submit the batch request:

- `oModel.addBatchChangeOperations(batchChanges);`
- `oModel.setUseBatch(true);`
- `oModel.submitBatch();`

Case Check Item - Update Entity

Use this method to update a case check item.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CaseCheckItems(<Case Check Item ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Fields updated: <ul style="list-style-type: none">• <code>StatusCode</code>• <code>StatusName</code>
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update a case check item, add the following fragment to the request URL used by the HTTP Patch method:

```
/CaseCheckItems(<Case Check Item ID>)
```

3.5 Case Item

Definition

This entity type represents an underwriting item of an underwriting case.

Business Context and Use

This entity type provides the basic set of properties that define an underwriting case item.

Associated SOA Operations

Not applicable

Implemented Methods

Case Item - Get Entity Set

Use this method to get a set of case items. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CaseItems</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	<p>The following properties can be used as filters:</p> <ul style="list-style-type: none">• Id• CaseId• Name• Category• Type• ExternalId• CaseItemReferral<ul style="list-style-type: none">• Id• SystemUwDetail• ExecutionId• DecisionComment• DecisionCode• CreatedOn• CreatedBy<ul style="list-style-type: none">• UserId• FirstName• LastName• UpdatedBy<ul style="list-style-type: none">• UserId• FirstName• LastName• UpdatedOn• RiskId

Sorting

The following properties can be used for sorting:

- Id
- CaseId
- Name
- Category
- Type
- ExternalId
- CaseItemReferral
 - Id
 - SystemUwDetail
 - ExecutionId
- DecisionComment
- DecisionCode
- CreatedOn
- CreatedBy
 - UserId
 - FirstName
 - LastName
- UpdatedBy
 - UserId
 - FirstName
 - LastName
- UpdatedOn
- RiskId

Use of the Method

To get a set of case items, add the following fragment to the request URL used by the HTTP Get method:

```
/CaseItems?$filter=(CreatedOn GT <> LT<> and Type=<>)
```

Case Item - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/CaseItems(<CaseItem ID>)$expand=CaseItemReferral
```

Case Item - Get Entity

Use this method to get the details of a case item.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CaseItems(<Case Item ID>)</code>
----------------	--

Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a case item, add the following fragment to the request URL used by the HTTP Get method:

`/CaseItems(<Case Item ID>)`

Case Item - Update Entity

Use this method to update the specified case item.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CaseItems(<Case Item ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Fields updated: <ul style="list-style-type: none"> • Decision <ul style="list-style-type: none"> • Code • DecisionReason <ul style="list-style-type: none"> • Code • DecisionComment
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update a case item, add the following fragment to the request URL used by the HTTP Patch method:

`/CaseItems(<Case Item ID>)`

Prerequisites

The case status is *In Process*.

Case Item - Get Policyholder Basic Information - Function Imports

Use this method to get the basic information of the policyholder.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/PolicyHolderBasicInfo</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the basic information of the policyholder, add the following fragment to the request URL used by the HTTP Get method:

```
/PolicyHolderBasicInfo
```

Prerequisites

- The case item is referred to a policyholder.
- The `CaseItem` ID is provided..

Case Item - Get Application Basic Information - Function Imports

Use this method to get the basic information of the application. Currently it only retrieves and displays the premium breakdown information from FS-PRO for a specific application (underwriting case).

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/ApplicationBasicInfo</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the application basic information, add the following fragment to the request URL used by the HTTP Get method:

```
/ApplicationBasicInfo
```

Prerequisites

If the category is Application (underwriting case), the following are required:

- Transaction ID
- Application ID (underwriting case ID)

Case Item - Check Decisions - Function Imports

Use this method to validate the underwriting decisions on the case item.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CheckDecisions</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To validate the decisions on the underwriting item, add the following fragment to the request URL used by the HTTP Get method:

```
/CheckDecisions
```

Case Item - Submit Decisions - Function Imports

Use this method to submit the underwriting decisions of the case items.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/SubmitDecisions</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Fields updated: <ul style="list-style-type: none">• Decision<ul style="list-style-type: none">• Code• DecisionReason<ul style="list-style-type: none">• Code• DecisionComment
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To submit the decisions, add the following fragment to the request URL used by the HTTP Post method:

```
/SubmitDecisions
```

3.6 Case Item Violation

Definition

This entity type represents a case item violation.

Business Context and Use

This entity type provides the basic set of properties that define a case item violation.

Associated SOA Operations

Not applicable

Implemented Methods

Case Item Violation - Get Entity Set

Use this method to get a set of case item violations. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CaseItemViolations</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none">• Id• Code• Description• CaseItemId
Sorting	The following properties can be used for sorting: <ul style="list-style-type: none">• Id• Code• Description• CaseItemId

Use of the Method

To get a set of case item violations, add the following fragment to the request URL used by the HTTP Get method:

```
/CaseItemViolations?CaseItemId=<Case Item Id>
```

3.7 Case Status

Definition

This entity type represents a case status.

Business Context and Use

This entity type provides the basic set of properties that define a case status.

Associated SOA Operations

Not applicable

Implemented Methods

Case Status - Get Entity Set

Use this method to get a set of case statuses. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<a href="http://<quo_app_url>/uw/odata.svc/CaseStatuses">http://<quo_app_url>/uw/odata.svc/CaseStatuses
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none">• Code• Name

Sorting

The following properties can be used for sorting:

- Code
- Name

Use of the Method

To get a set of case statuses, add the following fragment to the request URL used by the HTTP Get method:

```
/CaseStatuses?$filter=(Name=<>)
```

3.8 Case Violation

Definition

This entity type represents a case violation.

Business Context and Use

This entity type provides the basic set of properties that define a case violation.

Associated SOA Operations

Not applicable

Implemented Methods

Case Violation - Get Entity Set

Use this method to get a set of case violations. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CaseViolations</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- Id
- Code
- Description
- CaseId

Sorting

The following properties can be used for sorting:

- Id
 - Code
 - Description
 - CaseId
-

Use of the Method

To get a set of case violations, add the following fragment to the request URL used by the HTTP Get method:

```
/CaseViolations?CaseId=<Case Id>
```

3.9 Chatting Note

Definition

This entity type represents a chatting note.

Business Context and Use

This entity type provides the basic set of properties that define a chatting note.

Associated SOA Operations

Not applicable

Implemented Methods

Chatting Note - Get Entity Set

Use this method to get a set of chatting notes. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/ChattingNotes</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	<p>The following properties can be used as filters:</p> <ul style="list-style-type: none"> • Id • ApplicationId • NoteId • Message • SubmitTs • HasAttachments • FromUser <ul style="list-style-type: none"> • UserId • FirstName • LastName • ToUser <ul style="list-style-type: none"> • UserId • FirstName • LastName • SubmissionId • ReadFlag
Sorting	<p>The following properties can be used for sorting:</p> <ul style="list-style-type: none"> • Id • ApplicationId • NoteId • Message • SubmitTs • HasAttachments • FromUser <ul style="list-style-type: none"> • UserId • FirstName • LastName • ToUser <ul style="list-style-type: none"> • UserId • FirstName • LastName • SubmissionId • ReadFlag

Use of the Method

To get a set of chatting notes, add the following fragment to the request URL used by the HTTP Get method:

```
/ChattingNotes?ApplicationId=<Policy Quote Id>&$filter=(SubmitTs GT <> LT<> and Message=<>)
```

Chatting Note - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/ChattingNotes(<Note ID>)$expand=Attachments
```

Chatting Note - Create Entity

Use this method to create a case note.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/ChattingNotes</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Create entity Note
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To create a case note, add the following fragment to the request URL used by the HTTP Post method:

```
/ChattingNotes
```

Prerequisites

The request body of the chatting note is JSON value.

Chatting Note - Create Chatting Note - Function Imports (deprecated)

Use this method to create a chatting note.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CreateChattingNote</code>
Mode	Synchronous
Idempotency	No

Change / Update Behavior	Entity created: <ul style="list-style-type: none"> Chatting Note
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To create a chatting note, add the following fragment to the request URL used by the HTTP Post method:

`/CreateChattingNote`

Chatting Note - Retrieve Recent Note List - Function Imports

Use this method to get a list of notes the current user has received about the specified application. This list includes the latest relevant notes from each sender.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/RetrieveRecentNoteList</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get a list of notes the current user has received about the specified application, add the following fragment to the request URL used by the HTTP Get method:

`/RetrieveRecentNoteList?ApplicationId=<Case Id>&CurrentUserId=<Current User Id>`

Prerequisites

- ApplicationId
- CurrentUserId

Chatting Note - Get All Unread Note List - Function Imports

Use this method to get a list of all unread notes for a submission.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/GetAllUnReadNoteListForSubmission</code>
Mode	Synchronous

Idempotency	Yes
Change / Update Behavior	No
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get a list of all unread notes for a submission, add the following fragment to the request URL used by the HTTP Get method:

```
/GetAllUnReadNoteListForSubmission?SubmissionId=<Submission Id>&CurrentUserId=<Current User Id>
```

Prerequisites

- SubmissionId
- CurrentUserId

Chatting Note - Get UW Groups - Function Imports

Use this method to get underwriting groups by quote option.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/GetUWGroupsByQuoteOption</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	No
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get underwriting groups by quote option, add the following fragment to the request URL used by the HTTP Get method:

```
/GetUWGroupsByQuoteOption?ApplicationId=<app Id>
```

Prerequisites

- ApplicationId

Chatting Note - Update Unread Note - Function Imports

Use this method to update the status of unread notes for each user.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/updateUnReadNoteForEachUser</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	No
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update the status of unread notes for each user, add the following fragment to the request URL used by the HTTP Get method:

```
/updateUnReadNoteForEachUser
```

Prerequisites

The JSON value in the request body includes `fromUserId` & `toUserId` & `applicationId`.

3.10 Check Item

Definition

This entity type represents a check item.

Business Context and Use

This entity type provides the basic set of properties that define a check item.

Associated SOA Operations

Not applicable

Implemented Methods

Check Item - Retrieve Check Item List - Function Imports

Use this method to get a list of check items of a case.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/retrieveCheckItemList</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get a list of check items of a case, add the following fragment to the request URL used by the HTTP Get method:

```
/retrieveCheckItemList?caseId=(Case Id)
```

3.11 Check Item Mandatory Option

Definition

This entity type represents a check item mandatory option.

Business Context and Use

This entity type provides the basic set of properties that define a check item mandatory option.

Associated SOA Operations

Not applicable

Implemented Methods

Check MandOption - Retrieve Check Item MandOption List - Function Imports

Use this method to get the mandatory options of a check item.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/ retrieveCheckItemMandOptionList</code>
----------------	---

Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the mandatory options of a check item, add the following fragment to the request URL used by the HTTP Get method:

```
/retrieveCheckItemMandOptionList?caseId=<Case Id>
```

3.12 Check Item Status

Definition

This entity type represents a check item status.

Business Context and Use

This entity type provides the basic set of properties that define a check item status.

Associated SOA Operations

Not applicable

Implemented Methods

Check Item Status - Retrieve Check Item Status List - Function Imports

Use this method to get a list of check item statuses of a case.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/retrieveCheckItemStatusList</code>
Mode	Synchronous

Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get a list of check item statuses of a case, add the following fragment to the request URL used by the HTTP Get method:

3.13 Contract

Definition

This entity type represents a contract.

Business Context and Use

This entity type provides the basic set of properties that define a contract.

Associated SOA Operations

Not applicable

Implemented Methods

Contract - Get Entity Set [Not implemented]

Use this method to get a set of contracts for a policy quote.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/Contracts</code>
Mode	Synchronous
Idempotency	Yes

Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none"> ContractId ContractName ProductBaseId
Sorting	The following properties can be used for sorting: <ul style="list-style-type: none"> ContractId ContractName ProductBaseId

Use of the Method

To get a set of contracts for a policy quote, add the following fragment to the request URL used by the HTTP Get method:

```
/Contracts?$filter=(ContractName=<>)
```

Contract - Get Expand (\$expand) [Not implemented]

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/Contracts(<Contract ID>)$expand=PremiumBreakdowns,Coverages
```

Contract - Get Entity

Use this method to get the details of a contract.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/Contracts(<Contract ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a contract, add the following fragment to the request URL used by the HTTP Get method:

```
/Contracts(<Contract ID>)
```

Prerequisites

- The `ContractId` is provided.

3.14 Coverage

Definition

This entity type represents a coverage.

Business Context and Use

This entity type provides the basic set of properties that define a coverage.

Associated SOA Operations

Not applicable

Implemented Methods

Coverage - Get Entity Set [Not implemented]

Use this method to get a set of coverages for a policy contract.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/Coverages</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none"> • <code>CoverageId</code> • <code>CoverageName</code> • <code>ProductBaseId</code>
Sorting	The following properties can be used for sorting: <ul style="list-style-type: none"> • <code>CoverageId</code> • <code>CoverageName</code> • <code>ProductBaseId</code>

Use of the Method

To get a set of coverages for a policy contract, add the following fragment to the request URL used by the HTTP Get method:

```
/Coverages?$filter=(CoverageName=<>)
```

Coverage - Get Expand (\$expand) [Not implemented]

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/Coverages(<Coverage ID>)$expand=PremiumBreakdowns
```

Coverage - Get Entity

Use this method to get the details of a coverage.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/Coverages(<Coverage ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a coverage, add the following fragment to the request URL used by the HTTP Get method:

```
/Coverages(<Coverage ID>)
```

Prerequisites

- The CoverageId is provided.

3.15 Decision

Definition

This entity type represents an underwriting decision.

Business Context and Use

This entity type provides the basic set of properties that define a decision.

Associated SOA Operations

Not applicable

Implemented Methods

Decision - Get Entity Set

Use this method to get a set of decisions from Product Content. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/Decisions</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none">• Code• Name
Sorting	The following properties can be used for sorting: <ul style="list-style-type: none">• Code• Name

Use of the Method

To get a set of decisions from Product Content, add the following fragment to the request URL used by the HTTP Get method:

```
/Decisions?CaseId=<Case Id>&$filter=(Name=<>)
```

Prerequisites

The `CaseId` is provided.

3.16 Decision Reason

Definition

This entity type represents an underwriting decision reason.

Business Context and Use

This entity type provides the basic set of properties that define a decision reason.

Associated SOA Operations

Not applicable

Implemented Methods

Decision Reason - Get Entity Set

Use this method to get a set of decision reasons from Product Content. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/DecisioinReasons</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none">• Code• Name
Sorting	The following properties can be used for sorting: <ul style="list-style-type: none">• Code• Name

Use of the Method

To get a set of decision reasons from Product Content, add one of the following fragments to the request URL used by the HTTP Get method:

- `/DecisonReasons?CaseId=<Case Id>&DecisionCode=<DecisionCode>&$filter=(Name=<>)`

- /DecisionReasons?
SubmissionId=<SubmissionId>&DecisionCode=<DecisionCode>&\$filter=(Name=<>)

Prerequisites

- The Case ID is provided.
- The Decision Code is provided.

3.17 Evidence Category

Definition

This entity type represents an evidence category.

Business Context and Use

This entity type provides the basic set of properties that define an evidence category.

Associated SOA Operations

Not applicable

Implemented Methods

Evidence Category - Retrieve Evidence Category List - Function Imports

Use this method to get a list of evidence categories of a case.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/retrieveEvidenceCategoryList</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get a list of evidence categories of a case, add the following fragment to the request URL used by the HTTP Get method:

```
/retrieveEvidenceCategoryList?caseId=<Case Id>
```

3.18 Evidence Status

Definition

This entity type represents an evidence status.

Business Context and Use

This entity type provides the basic set of properties that define an evidence status.

Associated SOA Operations

Not applicable

Implemented Methods

Evidence Status - Retrieve Evidence Status List - Function Imports

Use this method to get a list of evidence statuses of a case.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/retrievEvidenceStatusList</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get a list of evidence statuses of a case, add the following fragment to the request URL used by the HTTP Get method:

```
/retrievEvidenceStatusList?caseId=<Case Id>
```

3.19 Evidence Type

Definition

This entity type represents an evidence type.

Business Context and Use

This entity type provides the basic set of properties that define an evidence type.

Associated SOA Operations

Not applicable

Implemented Methods

Evidence Type - Retrieve Evidence Type List - Function Imports

Use this method to get a list of evidence types of a case.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/retrieveEvidenceTypeList</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get a list of evidence types of a case, add the following fragment to the request URL used by the HTTP Get method:

```
/retrieveEvidenceTypeList?caseId=(Case Id)
```

3.20 Policy Evidence

Definition

This entity type represents a policy evidence.

Business Context and Use

This entity type provides the basic set of properties that define a policy evidence.

Associated SOA Operations

Not applicable

Implemented Methods

Policy Evidence - Get Entity Set

Use this method to get a set of policy evidences.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/PolicyEvidences</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- Id
 - SubmissionId
 - QuoteOptionId
 - ObjectId
 - ObjectType
 - ObjectTable
 - PrivacyCategory
 - SrcPhase
 - EvidenceId
 - EvidenceCategory
 - EvidenceCategoryName
 - EvidenceCategoryCode
 - EvidenceType
 - EvidenceTypeCode
 - EvidenceTypeName
 - Document
 - DocId
 - DocName
 - DocType
 - ObjectId
 - Score
 - CreateDate
 - CreateBy
 - UserId
 - FirstName
 - LastName
 - UpdateBy
 - UserId
 - FirstName
 - LastName
 - UpdateDate
-

Sorting

The following properties can be used for sorting:

- Id
- SubmissionId
- QuoteOptionId
- ObjectId
- ObjectType
- ObjectTable
- PrivacyCategory
- SrcPhase
- EvidenceId
- EvidenceCategory
 - EvidenceCategoryName
 - EvidenceCategoryCode
- EvidenceType
 - EvidenceTypeCode
 - EvidenceTypeName
- Document
 - DocId
 - DocName
 - DocType
 - ObjectId
- Score
- CreateDate
- CreateBy
 - UserId
 - FirstName
 - LastName
- UpdateBy
 - UserId
 - FirstName
 - LastName
- UpdateDate

Use of the Method

To get a set of policy evidences, add the following fragment to the request URL used by the HTTP Get method:

```
/PolicyEvidences?$filter=(EvidenceType=<>)
```

Policy Evidence - Get Expand (\$expand)

Use this method to get a set of navigation attributes with specified selection parameters.

Use of the Method

To get the details of the specified entity, add the following fragment to the request URL used by the HTTP Get method:

```
/PolicyEvidences(<PolicyEvidenceId>)$expand=EvidenceCategory
```

Policy Evidence - Get Entity

Use this method to get the details of a policy evidence.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/PolicyEvidences(<PolicyEvidence ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a policy evidence, add the following fragment to the request URL used by the HTTP Get method:

```
/PolicyEvidences(<Policy Evidence ID>)
```

Prerequisites

The `PolicyEvidenceId` is provided.

Policy Evidence - Create Entity

Use this method to create policy evidences.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/PolicyEvidences</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Create entity Policy Evidence
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To create a policy evidence, add the following fragment to the request URL used by the HTTP Post method:

`/PolicyEvidences`

Policy Evidence - Delete Entity

Use this method to delete a policy evidence clause.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/PolicyEvidences(<Policy Evidence ID>)</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	No
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To delete a policy evidence, add the following fragment to the request URL used by the HTTP Delete method:

`/PolicyEvidences(<Policy Evidence ID>)`

Prerequisites

- The policy evidence exists.
- The `Policy Evidence ID` is provided.

Policy Evidence - Batch Delete Entity

Use this method to delete policy evidences in batches.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/\$batch?</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Batch delete entity Policy Evidences
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

The front end needs to use the `ODataModel` to submit the batch request:

- `oModel.addBatchChangeOperations(batchChanges);`

- `oModel.setUseBatch(true);`
- `oModel.submitBatch();`

Prerequisites

- The policy evidences exist.
- The `Policy Evidence ID` of each policy evidence is provided.

Policy Evidence - Update Entity

Use this method to update a policy evidence.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/PolicyEvidences(<Policy Evidence ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Fields updated: <ul style="list-style-type: none"> • <code>EvidenceCategory</code> <ul style="list-style-type: none"> • <code>EvidenceCategoryName</code> • <code>EvidenceType</code> <ul style="list-style-type: none"> • <code>EvidenceTypeName</code>
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update a policy evidence, add the following fragment to the request URL used by the HTTP Patch method:

```
/PolicyEvidences(<Policy Evidence ID>)
```

3.21 Premium Breakdown

Definition

This entity type represents premium breakdown information.

Business Context and Use

This entity type provides the basic set of properties that define a premium breakdown structure.

Associated SOA Operations

Not applicable

Implemented Methods

Premium Breakdown - Get Entity Set [Not implemented]

Use this method to get a set of premium breakdowns for a quote option.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/PremiumsBreakdowns</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none">• Id• Name• Value• DisplayFormat• CurrencyCode
Sorting	The following properties can be used for sorting: <ul style="list-style-type: none">• Id• Name• Value• DisplayFormat• CurrencyCode

Use of the Method

To get a set of premium breakdowns for a quote option, add the following fragment to the request URL used by the HTTP Get method:

```
/PremiumsBreakdowns?$filter=(Name=<>)
```

Premium Breakdown - Get Entity

Use this method to get the details of a quote option.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/PremiumsBreakdowns(<ID>)</code>
----------------	---

Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a quote option, add the following fragment to the request URL used by the HTTP Get method:

PremiumsBreakdowns (<ID>)

Prerequisites

- ID: Quote Option ID + "-" + Premium Breakdown ID is provided.

3.22 Submission Worklist

Definition

This entity type represents the group case list.

Business Context and Use

This entity type provides the basic set of properties that define an underwriting group case.

Associated SOA Operations

Not applicable

Implemented Methods

Submission Worklist - Get Entity Set

Use this method to get a set of group cases.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/SubmissionWorkLists</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	<p>The following properties can be used as filters:</p> <ul style="list-style-type: none"> • Id • GroupCaseId • SubmissionId • SubmissionNumber • Status • AccountName • AccountNo • CreateDate • EffectiveDate • ExpirationDate • ProducerContactName • ProductDisplayName • SubmissionTypeCode • IsDeletable • UnderwritingGroup • DerivedSubmissionStatus • Owner <ul style="list-style-type: none"> • UserId • FirstName • LastName • PolicyId • MasterPolicyId • WorkingUserLoginId

Sorting

The following properties can be used for sorting:

- Id
- GroupCaseId
- SubmissionId
- SubmissionNumber
- Status
- AccountName
- AccountNo
- CreateDate
- EffectiveDate
- ExpirationDate
- ProducerContactName
- ProductDisplayName
- SubmissionTypeCode
- IsDeletable
- UnderwritingGroup
- DerivedSubmissionStatus
- Owner
 - UserId
 - FirstName
 - LastName
- PolicyId
- MasterPolicyId
- WorkingUserLoginId

Use of the Method

To get a set of group cases, add the following fragment to the request URL used by the HTTP Get method:

```
/SubmissionWorkLists?$filter=((substringof('%27<SubmissionId>%27,SubmissionNumber)%20eq%20true))
```

Submission Worklist - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/SubmissionWorkLists(<SubmissionId>)$expand=Owner
```

Submission Worklist - Get Entity

Use this method to get the details of a submission.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/SubmissionWorkLists(<SubmissionId>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a submission, add the following fragment to the request URL used by the HTTP Get method:

```
/SubmissionWorkLists(<SubmissionId>)
```

Prerequisites

The `SubmissionId` is provided.

Submission Worklist - Assign Group Case - Function Imports

Use this method to set a user as the owner of a group case, and change its status from *Unassigned* to *In Process*.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/ReassignGroupCase</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Field updates: <ul style="list-style-type: none"> • Owner • CaseStatus
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To set a user as the owner of a group case, add the following fragment to the request URL used by the HTTP Post Method:

```
/ReassignGroupCase?GroupCaseId=<GroupCaseId>&AssigneeId='<UserId>'
```

Prerequisites

- The status of the group case is *Unassigned*.

- The `GroupCaseId` and `AssigneeId` are provided.

Submission Worklist - Submit Group Decision - Function Imports

Use this method to submit the final decision on the underwriting group case and change its status to final status.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/SubmitGroupDecision</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Field updates: <ul style="list-style-type: none"> • <code>CaseStatus</code> • <code>Decision</code> • <code>DecisionReason</code> • <code>DecisionComment</code>
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To submit the final decision on the underwriting group case, add the following fragment to the request URL used by the HTTP Post method:

```
/SubmitGroupDecision
```

Prerequisites

- The case status is *In Process*.
- The decision on the case is not *Accepted* or *Declined*.
- The decision on the case item has no constrains.

The syntax of the parameters from HTTP POST Request is:

```
[{
  objectId : group case id,
  objectType : 'GroupCase',
  decisionCode : 'ACCEPTED',
  decisionReasonId : Decision reason ID,
  decisionComment : 'comments'
}]
```

Submission Worklist - Check Group Decision - Function Imports

Use this method to pre-check if the user can accept or decline a group case.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/CheckGroupDecision</code>
----------------	---

Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To pre-check if the user can accept or decline a group case, add the following fragment to the request URL used by the HTTP Post method:

/CheckGroupDecision

Prerequisites

The syntax of the parameters from HTTP POST Request is:

```
[{
  objectId : group case id,
  objectType : 'GroupCase',
  decisionCode : 'ACCEPTED',
  decisionReasonId : Decision reason ID,
  decisionComment : 'comments'
}]
```

Submission Worklist - Pre-check Reassign Group Case - Function Imports

Use this method to pre-check if a group case can be reassigned.

Technical Data

Technical Name	http://<quo_app_url>/uw/odata.svc/PreCheckReassignGroupCase
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To pre-check if a group case can be reassigned, add the following fragment to the request URL used by the HTTP Get method:

/PreCheckReassignGroupCase?GroupCaseId=<GroupCaseId>

Prerequisites

- GroupCaseId

Submission Worklist - Get All Submission Status - Function Imports

Use this method to get all submission statuses.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/getAllSubmissionStatuses</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get all submission statuses, add the following fragment to the request URL used by the HTTP Get method:

```
/getAllSubmissionStatuses
```

Prerequisites

The syntax of the parameters from HTTP POST Request is:

```
[{
  objectId : group case id,
  objectType : 'GroupCase',
  decisionCode : 'ACCEPTED',
  decisionReasonId : Decision reason ID,
  decisionComment : 'comments'
}]
```

3.23 System UW Result

Definition

This entity type represents an underwriting decision.

Business Context and Use

This entity type provides the basic set of properties that define a system underwriting result.

Associated SOA Operations

Not applicable

Implemented Methods

System UW Result - Get Entity Set

Use this method to get a set of system underwriting results from Product Content. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/SystemUWResults</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none">• Code• Name
Sorting	The following properties can be used for sorting: <ul style="list-style-type: none">• Code• Name

Use of the Method

To get a set of system underwriting results from Product Content, add the following fragment to the request URL used by the HTTP Get method:

```
/SystemUWResults?CaseId=<Case Id>&$filter=(Name=<>)
```

Prerequisites

The Case ID is provided.

3.24 Underwriting Group Member

Definition

This entity type represents the group member case list.

Business Context and Use

This entity type provides the basic set of properties that define an underwriting group member case.

Associated SOA Operations

Not applicable

Implemented Methods

Underwriting Group Member - Get Entity Set

Use this method to get a set of group members.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/GroupMembers</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	<p>The following properties can be used as filters:</p> <ul style="list-style-type: none">• GroupMemberId• GroupAgreementId• PartnerId• MemberPMDId• PlanId• PlanName• Title• Name• FirstName• LastName• Gender• CaseId• CaseStatus• MandatoryFlag• Owner<ul style="list-style-type: none">• FirstName• LastName• LoginName• Role• UserId• UnderwritingGroup

Sorting

The following properties can be used for sorting:

- GroupMemberId
- GroupAgreementId
- PartnerId
- MemberPMDId
- PlanId
- PlanName
- Title
- Name
- FirstName
- LastName
- Gender
- CaseId
- CaseStatus
- MandatoryFlag
- Owner
 - FirstName
 - LastName
 - LoginName
 - Role
 - UserId
- UnderwritingGroup

Use of the Method

To get a set of group members, add the following fragment to the request URL used by the HTTP Get method:

```
/GroupMembers?$filter=SubmissionId%20eq%20<SubmissionId>L
```

Underwriting Group Member - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/GroupMembers(<SubmissionId>)$expand=Owner
```

Underwriting Group Member - Mass Reassign Member Cases - Function Imports

Use this method to set the specific user as the owner of the selected group member case, and change the status of the group member case from *Unassigned* to *In Process*.

For more information about the technical data, use of the method, and prerequisites, see the "Case - Mass Reassign Cases - Function Imports" section of the [Case \[page 10\]](#) entity.

Underwriting Group Member - Mass Make Decisions - Function Imports

Use this method to submit the final decision on the underwriting group member case and change its status to final status.

For more information about the technical data, use of the method, and prerequisites, see the "Case - Mass Make Decision- Function Imports" section of the [Case \[page 10\]](#) entity.

Underwriting Group Member - Pre-check Application Decision - Function Imports

Use this method to pre-check if the user can accept, decline, or reassign specified group member cases.

For more information about the technical data, use of the method, and prerequisites, see the "Case - Pre-check Application Decision- Function Imports" section of the [Case \[page 10\]](#) entity.

3.25 Underwriting Quote Option

Definition

This entity type represents the option case list.

Business Context and Use

This entity type provides the basic set of properties that define an underwriting option case.

Associated SOA Operations

Not applicable

Implemented Methods

Underwriting Quote Option - Get Entity Set

Use this method to get a set of option cases.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/UWQuoteOptions</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- OptionId
- OptionSeq
- CaseId
- CaseStatus
- MandatoryFlag
- SubmissionId
- PolicyHolder
- Owner
 - FirstName
 - LastName
 - LoginName
 - Role
 - UserId
- UnderwritingGroup

Sorting

The following properties can be used for sorting:

- OptionId
- OptionSeq
- CaseId
- CaseStatus
- MandatoryFlag
- SubmissionId
- PolicyHolder
- Owner
 - FirstName
 - LastName
 - LoginName
 - Role
 - UserId
- UnderwritingGroup

Use of the Method

To get a set of option cases, add the following fragment to the request URL used by the HTTP Get method:

```
/UWQuoteOptions?$filter=SubmissionId%20eq%20<SubmissionId>L
```

Underwriting Quote Option - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/UWQuoteOptions(<SubmissionId>)$expand=Owner
```

Underwriting Quote Option - Get Entity

Use this method to get the details of a quote option.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/UWQuoteOptions(<Quote Option ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a quote option, add the following fragment to the request URL used by the HTTP Get method:

```
/UWQuoteOptions(<Quote Option ID>)
```

Prerequisites

The `Quote Option ID` is provided.

Underwriting Quote Option - Mass Reassign Option Cases - Function Imports

Use this method to set the specific user as the owner of the selected option cases, and change the statuses of the option cases from *Unassigned* to *In Process*.

For more information about the technical data, use of the method, and prerequisites, see the "Case - Mass Reassign Cases - Function Imports" section of the [Case \[page 10\]](#) entity.

Underwriting Quote Option - Mass Make Decisions - Function Imports

Use this method to submit the final decisions on the underwriting option cases and change their statuses to final statuses.

For more information about the technical data, use of the method, and prerequisites, see the "Case - Mass Make Decision- Function Imports" section of the [Case \[page 10\]](#) entity.

Underwriting Quote Option - Pre-check Application Decision - Function Imports

Use this method to pre-check if the users can accept, decline, or reassign the specified option cases.

For more information about the technical data, use of the method, and prerequisites, see the "Case - Pre-check Application Decision- Function Imports" section of the [Case \[page 10\]](#) entity.

Underwriting Quote Option - Create Counteroffer

Use this method to create a counteroffer.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/createCounterOffer</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Create entity counteroffer
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To create a counteroffer, add the following fragment to the request URL used by the HTTP Get method:

```
/createCounterOffer?quoteOptionId=<Quote Option ID>
```

Prerequisites

The `Quote Option ID` is provided.

Underwriting Quote Option - Get Multiple Currency Category - Function Imports

Use this method to get multiple currency category.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/MultiCurrencyCategory</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Create multiple currency category
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get multiple currency category, add the following fragment to the request URL used by the HTTP Get method:

```
/MultiCurrencyCategory?quoteOptionId=<Quote Option ID>
```

Prerequisites

The `Quote Option ID` is provided.

Underwriting Quote Option - Calculate Individual Premium - Function Imports

Use this method to calculate individual premium.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/calculateIndividualPremium</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Calculate Individual premium
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To calculate individual premium, add the following fragment to the request URL used by the HTTP Get method:

```
/calculateIndividualPremium?quoteOptionId=<Quote Option ID>
```

Prerequisites

The `Quote Option ID` is provided.

3.26 Underwriting Rule Level

Definition

This entity type represents an underwriting rule level.

Business Context and Use

This entity type provides the basic set of properties that define an underwriting rule level.

Associated SOA Operations

Not applicable

Implemented Methods

Underwriting Rule Level - Retrieve Rule Level List - Function Imports

Use this method to get a list of underwriting rule levels.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/retrieveRuleLevelList</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get a list of underwriting rule levels, add the following fragment to the request URL used by the HTTP Get method:

```
/retrieveRuleLevelList?caseId=(Case Id)
```

4 Quotation OData Model

Definition

This Entity Data Model (EDM) includes the OData model definition for quotation.

Business Context and Use

This EDM provides OData models for quotation.

Corresponding Project

The implementation of quotation OData services is based on Olingo.

Entity Types

The topics contained in this chapter indicate the available entity types.

Error Handling

For all methods of the entity types above, in case of failure, the methods return the following information to the UI:

- The main error messages from the failed associated by Java library: Olingo
- The individual error categories from the failed associated by Java library: Olingo
- The following OData error message categories:
 - Technical exceptions: could be errors of service communication or missing parameters.
 - Business exceptions: error messages from the back-end system concerning the issue.

4.1 Account

Definition

This entity type represents a group quote account.

Note

This is a shared entity type with individual quotes.

Business Context and Use

This entity type provides the basic set of properties that define a group quote account.

Associated SOA Operations

Not applicable

Implemented Methods

Account - Get Entity Set

Use this method to get a set of group quote accounts.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Account</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- AccountId
 - AccountNo
 - LegalEntity
 - Name
 - FirstName
 - OtherGivenName
 - LastName
 - MiddleInitial
 - DateOfBirth
 - Gender
 - Title
 - CompanyName
 - PhoneNumber
 - EmailAddress
 - Website
 - LanguageCode
 - PhysicalAddress
 - DoingBusinessAs
 - DateOfIncorporation
 - NaicsCode
 - SicCode
 - AnnualRevenue
 - ParentAccount
 - TODO
 - SubAccounts
 - TODO
 - AdditionalInsureds
 - TODO
 - AdditionalInterests
 - TODO
-

Sorting

The following properties can be used for sorting:

- AccountId
- AccountNo
- LegalEntity
- Name
- FirstName
- OtherGivenName
- LastName
- MiddleInitial
- DateOfBirth
- Gender
- Title
- CompanyName
- PhoneNumber
- EmailAddress
- Website
- LanguageCode
- PhysicalAddress
- DoingBusinessAs
- DateOfIncorporation
- NaicsCode
- SicCode
- AnnualRevenue
- ParentAccount
 - TODO
- SubAccounts
 - TODO
- AdditionalInsureds
 - TODO
- AdditionalInterests
 - TODO

Use of the Method

To get a set of group quote accounts, add the following fragment to the request URL used by the HTTP Get method:

/Account

Account - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/Accounts( '<AccountId>' )?$expand=ParentAccount
```

Account - Get Entity

Use this method to get the details of an account.

Technical Data

Technical Name	/quo/odata.svc/Accounts('<AccountId>')
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of an account, add the following fragment to the request URL used by the HTTP Get method:

```
/Accounts( '<AccountId>' )
```

Prerequisites

The AccountId is provided.

Account - Create Entity

Use this method to create an account.

Technical Data

Technical Name	/quo/odata.svc/Accounts
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To create an account, add the following fragment to the request URL used by the HTTP POST method:

```
/Accounts
```

The syntax of the parameters from HTTP POST Request is:

```
{
  DateOfBirth: Date,
  FirstName: 'first name',
  LastName: 'last name',
  Gender: 'gender',
  LegalEntity: 'INDIV',
  Name: Gender FirstName LastName,
  Title: 'title',
  PhysicalAddress : {
    AddressLine1: 'AddressLine1',
    City1: 'city name',
    Country: 'country code',
    HouseNumber: 'house number',
    PostalCode: 'code number',
    Region: 'region number',
    StreetName: 'street name',
  }
}
```

4.2 Group Agreement

Definition

This entity type represents a group agreement.

Business Context and Use

This entity type provides the basic set of properties that define a group agreement.

Associated SOA Operations

Not applicable

Implemented Methods

Group Agreement - Get Entity

Use this method to get the details of a group agreement.

Technical Data

Technical Name	<a)"="" href="http://<quo_app_url>/quo/odata.svc/GroupAgreements(<AgreementId>">http://<quo_app_url>/quo/odata.svc/ GroupAgreements(<AgreementId>)
----------------	---

Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a group agreement, add the following fragment to the request URL used by the HTTP Get method:

```
/GroupAgreements(<AgreementId>)
```

Prerequisites

The `AgreementId` is provided.

Group Agreement - Get eApp Layout Name - Function Imports

Use this method to get the eApp layout name of specific PMD (Policy Master Data) data.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/getEappLayoutName</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the eApp layout name, add the following fragment to the request URL used by the HTTP GET method:

```
/getEappLayoutName?pmdId=<PMD Id>
```

Prerequisites

The user has logged in to the system.

Group Agreement - Update Dirty Flag for All Group Members - Function Imports

Use this method to update the dirty flag of the group members under a group agreement.

About Dirty Flag

A member policy with a dirty flag is a policy which is not rated yet or has to be re-rated.

You must set the dirty flag as `True` when:

- A member policy is newly created so that it's not rated yet.
- A member policy is rated, but something may be changed via UI (entering eApp), so it needs to be re-rated.

On the one hand, dirty flag doesn't necessarily mean the validation fails; on the other hand, if the validation fails, then the member policy can't be rated, so it definitely should be dirty-flagged.

When the user clicks [Issue](#) to issue all member policies in the group, the first thing to do is going through the member list, see which member is dirty flagged, rate the member policy if yes, and then remove the dirty flag after rating is completed.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/updateGroupMembersDirty</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update the dirty flag of a group member, add the following fragment to the request URL used by the HTTP POST method:

```
/updateGroupMembersDirty
```

The syntax of the parameters from HTTP POST Request is:

```
agreementId:<group agreement id>,  
objectId:0 or 1
```

Prerequisites

The user has logged in to the system.

4.3 Group Member

Definition

This entity type represents a group member.

Business Context and Use

This entity type provides the basic set of properties that define a group member.

Associated SOA Operations

Not applicable

Implemented Methods

Group Member - Get Entity Set

Use this method to get a set of group members.

Technical Data

Technical Name	<a href="http://<quo_app_url>/quo/odata.svc/GroupMembers">http://<quo_app_url>/quo/odata.svc/GroupMembers
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	<p>The following properties can be used as filters:</p> <ul style="list-style-type: none">• GroupMemberId• GroupAgreementId• PartnerId• MemberPMDId• PlanId• PlanName• Title• FirstName• LastName• Gender• Email• SocialSecurityNumber• JobTitle• DateOfBirth• CreateBy• CreateDate• UpdateBy• UpdateDate

Sorting

The following properties can be used for sorting:

- GroupMemberId
- GroupAgreementId
- PartnerId
- MemberPMDId
- PlanId
- PlanName
- Title
- FirstName
- LastName
- Gender
- Email
- SocialSecurityNumber
- JobTitle
- DateOfBirth
- CreateBy
- CreateDate
- UpdateBy
- UpdateDate

Use of the Method

To get a set of group members, add the following fragment to the request URL used by the HTTP Get method:

```
/GroupMembers?$skip=0&$top=1&$filter=GroupAgreementId%20eq%20<GroupAgreementId>L
```

Group Member - Get Entity

Use this method to get the details of a group member.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupMembers(<Group Member Id>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a group member, add the following fragment to the request URL used by the HTTP Get method:

```
/GroupMembers(<Group Member Id>)
```

Prerequisites

The `GroupId` is provided.

Group Member - Create Entity

Use this method to create a group member.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupMembers</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To create a group member, add the following fragment to the request URL used by the HTTP POST method:

```
/GroupMembers
```

The syntax of the parameters from HTTP POST Request is:

```
{
  GroupAgreementId: 'GroupAgreementId',
  PartnerId: 'PartnerId',
  PlanId: 'PlanId'
}
```

Group Member - Update Entity

Use this method to update a group member.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupMembers</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Fields updated: <ul style="list-style-type: none">PlanDescriptionPlanName

Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update a group member, add the following fragment to the request URL used by the HTTP PUT method:

`/GroupMembers (<GroupMemberId>)`

The syntax of the parameters from HTTP PUT Request is:

```
{
  PlanId: 'PlanId',
}
```

Group Member - Delete Entity

Use this method to delete a group member.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupMembers</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To delete a group member, add the following fragment to the request URL used by the HTTP DELETE method:

`/GroupMembers (<GroupMemberId>)`

Group Member - Update Dirty Flag for a Group Member - Function Imports

Use this method to update the dirty flag of a group member under a group agreement.

About Dirty Flag

A member policy with a dirty flag is a policy that isn't rated yet or has to be re-rated.

You must set the dirty flag as `True` when:

- A member policy is newly created so that it isn't rated yet.
- A member policy is rated, but something may be changed via UI (entering eApp), so it needs to be re-rated.

On the one hand, dirty flag doesn't necessarily mean the validation fails; on the other hand, if the validation fails, then the member policy can't be rated, so it definitely should be dirty-flagged.

When the user clicks [Issue](#) to issue all member policies in the group, the first thing to do is going through the member list, see which member is dirty flagged, rate the member policy if yes, and then after rating is completed, remove the dirty flag.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/updateGroupMemberDirty</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update the dirty flag of a group member, add the following fragment to the request URL used by the HTTP POST method:

`/updateGroupMembersDirty`

The syntax of the parameters from HTTP POST Request is:

```
memberId:<group member id>,  
objectId:0 or 1
```

Prerequisites

The user has logged in to the system.

Group Member - Calculate Member Premium after Tax - Function Imports

Use this method to calculate the premium and set the after-tax premium for group agreement, group plan, and group member.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/ CalculateMemberPremiumAfterTax</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To calculate the premium and set the after-tax premium for group agreement, group plan, and group member, add the following fragment to the request URL used by the HTTP GET method:

```
/CalculateMemberPremiumAfterTax?agreementId=<group agreement id>
```

Prerequisites

The user has logged in to the system.

4.4 Group Member Insured Object

Definition

This entity type represents a group member for the insured object.

Business Context and Use

This entity type provides the basic set of properties that define a group member for the insured object.

Associated SOA Operations

Not applicable

Implemented Methods

Group Member Insured Object - Get Entity Set

Use this method to get a set of group members.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupMemberInsuredObjs</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- GroupAgreementId
- MemberPMDId
- ValidateStatus
- PremiumAfterTax
- QuoteStatus
- ExternalPolicyId
- Description
- DirtyFlag
- PremiumAfterTaxTT

Sorting

The following properties can be used for sorting:

- GroupAgreementId
- MemberPMDId
- ValidateStatus
- PremiumAfterTax
- QuoteStatus
- ExternalPolicyId
- Description
- DirtyFlag
- PremiumAfterTaxTT

Use of the Method

To get a set of group members, add the following fragment to the request URL used by the HTTP Get method:

```
/GroupMemberInsuredObjs?  
$skip=0&$top=1&$filter=GroupAgreementId%20eq%20<GroupAgreementId>L
```

Group Member Insured Object - Get Entity

Use this method to get the details of a group member insured object.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupMemberInsuredObjs(<GroupMemberId>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a group member insured object, add the following fragment to the request URL used by the HTTP Get method:

```
/GroupMemberInsuredObjs(<Group Member Id>)
```

Prerequisites

The `GroupId` is provided.

Group Member Insured Object - Create Entity

Use this method to create the details of a group member.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupMemberInsuredObjs</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To create a group member, add the following fragment to the request URL used by the HTTP POST method:

```
/GroupMemberInsuredObjs
```

The syntax of the parameters from HTTP POST Request is:

```
{
  GroupAgreementId: 'GroupAgreementId',
  Description: 'Description'
}
```

Group Member Insured Object - Update Entity

Use this method to update a group member.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/ GroupMemberInsuredObjs(<GroupId>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Fields updated: <ul style="list-style-type: none">• Description

Filtering	Not applicable
-----------	----------------

Sorting	Not applicable
---------	----------------

Use of the Method

To update a group member, add the following fragment to the request URL used by the HTTP PUT method:

```
/GroupMemberInsuredObjs(<GroupMemberId>)
```

The syntax of the parameters from HTTP PUT Request is:

```
{  
  Description: 'Description'  
}
```

Group Member Insured Object - Delete Entity

Use this method to delete a group member.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/ GroupMemberInsuredObjs(<GroupMemberId>)</code>
----------------	--

Mode	Synchronous
------	-------------

Idempotency	Yes
-------------	-----

Change / Update Behavior	Not applicable
--------------------------	----------------

Filtering	Not applicable
-----------	----------------

Sorting	Not applicable
---------	----------------

Use of the Method

To delete a group member, add the following fragment to the request URL used by the HTTP DELETE method:

```
/GroupMemberInsuredObjs(<GroupMemberId>)
```

4.5 Group Plan

Definition

This entity type represents a group plan.

Business Context and Use

This entity type provides the basic set of properties that define a group plan.

Associated SOA Operations

Not applicable

Implemented Methods

Group Plan - Get Entity Set

Use this method to get a set of group plans.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupPlans</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none">• PlanId• AgreementId• PlanName• PlanDescription• TotalMemberCount• StencilPMDId• CreateBy• CreateDate• UpdateBy• UpdateDate• MaleMemberCount• FemaleMemberCount• SubmissionNumber

Sorting

The following properties can be used for sorting:

- PlanId
- AgreementId
- PlanName
- PlanDescription
- TotalMemberCount
- StencilPMDId
- CreateBy
- CreateDate
- UpdateBy
- UpdateDate
- MaleMemberCount
- FemaleMemberCount
- SubmissionNumber

Use of the Method

To get a set of group plans, add the following fragment to the request URL used by the HTTP Get method:

/GroupPlans

Group Plan - Get Entity

Use this method to get the details of a group plan.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupPlans(<groupPlanId>L)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a group plan, add the following fragment to the request URL used by the HTTP Get method:

GroupPlans(<groupPlanId>L)

Prerequisites

The GroupPlanId is provided.

Group Plan - Create Entity

Use this method to create a group plan.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupPlans</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To create a group plan, add the following fragment to the request URL used by the HTTP POST method:

`/GroupPlans`

The syntax of the parameters from HTTP POST Request is:

```
{
  AgreementId: 'AgreementId',
  PlanDescription: 'description',
  PlanName: 'plan name',
}
```

Group Plan - Update Entity

Use this method to update a group plan.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupPlans(<groupPlanId>L)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Fields updated: <ul style="list-style-type: none">• <code>PlanDescription</code>• <code>PlanName</code>
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update a group plan, add the following fragment to the request URL used by the HTTP PUT method:

`/GroupPlans(<groupPlanId>L)`

The syntax of the parameters from HTTP PUT Request is:

```
{
  AgreementId: 'AgreementId',
  PlanDescription: 'description',
  PlanName: 'plan name',
}
```

Group Plan - Delete Entity

Use this method to delete a group plan.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/GroupPlans(<groupPlanId>L)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To delete a group plan, add the following fragment to the request URL used by the HTTP DELETE method:

`/GroupPlans(<groupPlanId>)`

Group Plan - Copy Group Plan - Function Imports

Use this method to copy a group plan.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/CopyGroupPlan</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To copy a group plan, add the following fragment to the request URL used by the HTTP POST method:

`/CopyGroupPlan`

The syntax of the parameters from HTTP POST Request is:

```
{
  newGroupPlanDescription: New Plan Description,
  newGroupPlanName: New Plan Name,
  srcGroupPlanId: Source Group Plan Id,
}
```

4.6 Group Quote Summary

Definition

This entity type represents a group quote summary.

Business Context and Use

This entity type provides the basic set of properties that define a group quote summary.

Associated SOA Operations

Not applicable

Implemented Methods

Group Quote Summary - Get Entity

Use this method to get the details of a group quote summary.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/ GroupQuoteSummaries('<SubmissionId>')</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a group quote summary, add the following fragment to the request URL used by the HTTP Get method:

```
/GroupQuoteSummaries( '<SubmissionId>' )
```

Prerequisites

The `SubmissionId` is provided.

Group Quote Summary - View Group Quote Letter - Function Imports

Use this method to generate the quote letter and change the submission status to *Quoted*.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/viewGroupQuoteLetter</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To submit the group agreement, add the following fragment to the request URL used by the HTTP GET method:

```
/viewGroupQuoteLetter?agreementId=<GroupAgreementId>
```

Prerequisites

The `AgreementId` is provided.

Group Quote Summary - Request for Group Underwriting - Function Imports

Use this method to submit the group insurance quotation for underwriting.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/requestGroupUnderwriting</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To submit the group insurance quotation for underwriting, add the following fragment to the request URL used by the HTTP GET method:

```
/requestGroupUnderwriting?  
transactionId=<SubmissionId>&groupAgreementId=<GroupAgreementId>
```

Prerequisites

The `transactionId` and `groupAgreementId` are provided.

Group Quote Summary - Update Group Status from 'Created' or 'Approved' to 'Working' - Function Imports

Use this method to update the status of a group agreement from *Created* or *Approved* to *Working*.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/updateGroupStatus2Working</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update the status of a group agreement from *Created* to *Working*, add the following fragment to the request URL used by the HTTP GET method:

```
/requestGroupUnderwriting?  
transactionId=<SubmissionId>&groupAgreementId=<GroupAgreementId>
```

Prerequisites

The `transactionId` and `groupAgreementId` are provided.

4.7 Master Policy Template Product

Definition

This entity type represents a master policy template product.

Business Context and Use

This entity type provides the basic set of properties that define a master policy template product within FS-PRO.

Associated SOA Operations

Not applicable

Implemented Methods

Master Policy Product - Get Entity Set

Use this method to get a set of master policy template products.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/MasterPolicyProducts</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none">• <code>ProductDisplayName</code>• <code>ProductName</code>• <code>ProductCode</code>• <code>ProductVersion</code>• <code>TemplateId</code>• <code>LanguageCode</code>
Sorting	The following properties can be used for sorting: <ul style="list-style-type: none">• <code>ProductDisplayName</code>• <code>ProductName</code>• <code>ProductCode</code>• <code>ProductVersion</code>• <code>TemplateId</code>• <code>LanguageCode</code>

Use of the Method

To get a set of master policy products, add the following fragment to the request URL used by the HTTP Get method:

```
/MasterPolicyProducts?  
$filter=substringof('%27<ProductDisplayName>%27,ProductDisplayName)  
%20and%20substringof('%27<TemplateId>%27,TemplateId)
```

Master Policy Product - Get Entity

Use this method to get the details of a master policy template product.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/MasterPolicyProducts(<Product ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a master policy product, add the following fragment to the request URL used by the HTTP Get method:

```
/MasterPolicyProducts(<Product ID>)
```

Prerequisites

The `Product ID` is provided.

4.8 Master Submission

Definition

This entity type represents a master insurance quote.

Business Context and Use

This entity type provides the basic set of properties that define a master insurance quote for master policy creation within New Business.

Associated SOA Operations

Not applicable

Implemented Methods

Master Submission - Get Entity Set

Use this method to get a set of master submissions.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/MasterSubmissions</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	<p>The following properties can be used as filters:</p> <ul style="list-style-type: none">• <code>MasterName</code>• <code>MasterTypeCode</code>• <code>MasterTypeName</code>• <code>TemplateId</code>• <code>TemplateName</code>• <code>MasterPolicyId</code>• <code>MasterBeginDate</code>• <code>MasterEndDate</code>• <code>EffectiveDate</code>• <code>CreationDate</code>• <code>ExpirationDate</code>• <code>SubmissionNumber</code>• <code>SubmissionStatus</code>• <code>TransactionType</code>• <code>ReadOnly</code>• <code>DerivedSubmissionStatus</code>• <code>SubmissionTypeCode</code>• <code>Product</code><ul style="list-style-type: none">• <code>TODO</code>• <code>QuoteOptions</code><ul style="list-style-type: none">• <code>TODO</code>• <code>WorkingUser</code><ul style="list-style-type: none">• <code>TODO</code>

Sorting

The following properties can be used for sorting:

- MasterName
- MasterTypeCode
- MasterTypeName
- TemplateId
- TemplateName
- MasterPolicyId
- MasterBeginDate
- MasterEndDate
- EffectiveDate
- CreationDate
- ExpirationDate
- SubmissionNumber
- SubmissionStatus
- TransactionType
- ReadOnly
- DerivedSubmissionStatus
- SubmissionTypeCode
- Product
 - TODO
- QuoteOptions
 - TODO
- WorkingUser
 - TODO

Use of the Method

To get a set of master submissions, add the following fragment to the request URL used by the HTTP Get method:

```
/MasterSubmission
```

Master Submission - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/MasterSubmissions(<submission_ID>)?$expand=Product
```

Master Submission - Get Entity

Use this method to get the details of a master submission.

Technical Data

Technical Name	http://<quo_app_url>/quo/odata.svc/ MasterSubmissions(<submission_ID>)
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a master submission, add the following fragment to the request URL used by the HTTP Get method:

```
/MasterSubmissions(<submission_ID>)
```

Prerequisites

The <submission_ID> is provided.

Master Submission - Update Entity

Use this method to update a master insurance quote.

Technical Data

Technical Name	http://<quo_app_url>/quo/odata.svc/ MasterSubmissions(<submission_ID>)
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Fields updated: <ul style="list-style-type: none"> • MasterName • MasterTypeCode • TemplateId • Product <ul style="list-style-type: none"> • ProductId • ProductDisplayName • ProductCode • ProductName • ProductVersion • LanguageCode
Filtering	Not applicable

Sorting

Not applicable

Use of the Method

To update a master submission, add the following fragment to the request URL used by the HTTP Put method:

```
/MasterSubmissions(<submission_ID>)
```

The syntax of the parameters from HTTP Put Request is:

```
{
  MasterName: 'master name',
  MasterTypeCode: 'master type code',
  TemplateId: 'template id',
  Product:
    {
      ProductId: 'product id',
      ProductDisplayName: 'product display name',
      ProductCode: 'product code',
      ProductName: 'product name',
      ProductVersion: 'product version',
      LanguageCode: 'language code',
    }
}
```

Prerequisites

The specified master submission is created.

Master Submission - Issue Master Policy

Use this method to issue a master insurance quote to FS-PM.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/issueMasterPolicy</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	No
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To issue a master insurance quote to FS-PM, add the following fragment to the request URL used by the HTTP Get method:

```
/issueMasterPolicy?masterSubmissionID=<master_Submission_ID>
```

Prerequisites

The user has logged in to the system.

Master Submission - Get All Master Policy Types

Use this method to get all master policy types that contain a type code and a name.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/getAllMasterPolicyTypes</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	No
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get all master policy types that contain a type code and a name, add the following fragment to the request URL used by the HTTP Get method:

```
/getAllMasterPolicyTypes
```

Prerequisites

The user has logged in to the system.

4.9 Multi-individual Submission

Definition

This entity type represents a multi-individual insurance quote from a master policy.

Business Context and Use

This entity type provides the basic set of properties that define a multi-individual insurance quote from master policy within New Business.

Associated SOA Operations

Not applicable

Implemented Methods

Multi-individual Submission - Get Entity Set

Use this method to get a set of multi-individual submissions.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/MultiIndividualSubmissions</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	<p>The following properties can be used as filters:</p> <ul style="list-style-type: none">• <code>EffectiveDate</code>• <code>CreationDate</code>• <code>ExpirationDate</code>• <code>SubmissionNumber</code>• <code>SubmissionStatus</code>• <code>TransactionType</code>• <code>ReadOnly</code>• <code>DerivedSubmissionStatus</code>• <code>SubmissionTypeCode</code>• <code>MasterPolicyId</code>• <code>MasterSubmissionId</code>• <code>GroupAgreementId</code>• <code>MasterPolicyInfo</code><ul style="list-style-type: none">• <code>MasterPolicyID</code>• <code>MasterPolicyName</code>• <code>MasterPolicyType</code>• <code>Account</code><ul style="list-style-type: none">• <code>TODO</code>• <code>QuoteOptions</code><ul style="list-style-type: none">• <code>TODO</code>• <code>WorkingUser</code><ul style="list-style-type: none">• <code>TODO</code>

Sorting

The following properties can be used for sorting:

- EffectiveDate
- CreationDate
- ExpirationDate
- SubmissionNumber
- SubmissionStatus
- TransactionType
- ReadOnly
- DerivedSubmissionStatus
- SubmissionTypeCode
- MasterPolicyId
- MasterSubmissionId
- GroupAgreementId
- MasterPolicyInfo
 - MasterPolicyID
 - MasterPolicyName
 - MasterPolicyType
- Account
 - TODO
- QuoteOptions
 - TODO
- WorkingUser
 - TODO

Use of the Method

To get a set of multi-individual submissions, add the following fragment to the request URL used by the HTTP Get method:

```
/MultiIndividualSubmissions
```

Multi-individual Submission - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/MultiIndividualSubmissions(<Submission ID>)?$expand=Account
```

Multi-individual Submission - Get Entity

Use this method to get the details of a multi-individual submission.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/ MultiIndividualSubmissions(<Submission ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a multi-individual submission, add the following fragment to the request URL used by the HTTP Get method:

```
/MultiIndividualSubmissions(<Submission ID>)
```

Prerequisites

The `Submission ID` is provided.

Multi-individual Submission - Create Entity

Use this method to create the details of a submission.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/MultiIndividualSubmissions</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To create the details of a submission, add the following fragment to the request URL used by the HTTP Post method:

```
/MultiIndividualSubmissions
```

The syntax of the parameters from HTTP Post Request is:

```
{
  SubmissionStatus: "CRE"
}
```

Multi-individual Submission - Update Entity

Use this method to update a multi-individual quote.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/ MultiIndividualSubmissions(<Submission ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Fields updated: <ul style="list-style-type: none">• <code>EffectiveDate</code>• <code>ExpirationDate</code>• <code>MasterSubmissionId</code>
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update a multi-individual quote, add the following fragment to the request URL used by the HTTP Put method:

```
/MultiIndividualSubmissions(<Submission ID>)
```

The syntax of the parameters from HTTP Put Request is:

```
{  
  EffectiveDate: 'effective date',  
  ExpirationDate: 'expiration date',  
  MasterSubmissionId: 'master submission id'  
}
```

Prerequisites

The specified multi-individual submission is created.

4.10 Producer

Definition

This entity type represents a producer of a group quote.

Note

This is a shared entity type with individual quotes.

Business Context and Use

This entity type provides the basic set of properties that define a producer of a group quote.

Associated SOA Operations

Not applicable

Implemented Methods

Producer - Get Entity Set

Use this method to get a set of producers.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Producers</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- LanguageCode
- MailingAddress
 - AddressLine1
 - AddressLine2
 - AddressLine3
 - AddressLine4
 - AddressLongText
 - AreaName
 - BuildingName
 - City1
 - City2
 - CompanyPostalCode
 - Country
 - County
 - District
 - FloorNumber
 - HouseNumber
 - PoBoxCity
 - PoBoxCountry
 - PoBoxNumber
 - PoBoxPostalCode
 - PoBoxRegion
 - PostalCode
 - Region
 - StreetName
- PhysicalAddressss
 - AddressLine1
 - AddressLine2
 - AddressLine3
 - AddressLine4
 - AddressLongText
 - AreaName
 - BuildingName
 - City1
 - City2
 - CompanyPostalCode
 - Country
 - County
 - District
 - FloorNumber
 - HouseNumber

- PoBoxCity
 - PoBoxCountry
 - PoBoxNumber
 - PoBoxPostalCode
 - PoBoxRegion
 - PostalCode
 - Region
 - StreetName
 - ProducerContacts
 - TODO
 - ProducerCode
 - ProducerId
 - ProducerName
-

Sorting

The following properties can be used for sorting:

- LanguageCode
- MailingAddress
 - AddressLine1
 - AddressLine2
 - AddressLine3
 - AddressLine4
 - AddressLongText
 - AreaName
 - BuildingName
 - City1
 - City2
 - CompanyPostalCode
 - Country
 - County
 - District
 - FloorNumber
 - HouseNumber
 - PoBoxCity
 - PoBoxCountry
 - PoBoxNumber
 - PoBoxPostalCode
 - PoBoxRegion
 - PostalCode
 - Region
 - StreetName
- PhysicalAddressss
 - AddressLine1
 - AddressLine2
 - AddressLine3
 - AddressLine4
 - AddressLongText
 - AreaName
 - BuildingName
 - City1
 - City2
 - CompanyPostalCode
 - Country
 - County
 - District
 - FloorNumber
 - HouseNumber

- PoBoxCity
- PoBoxCountry
- PoBoxNumber
- PoBoxPostalCode
- PoBoxRegion
- PostalCode
- Region
- StreetName
- ProducerContacts
 - TODO
- ProducerCode
- ProducerId
- ProducerName

Use of the Method

To get a set of producers, add the following fragment to the request URL used by the HTTP Get method:

```
/Producers?$filter=substringof(%27<ProducerName>%27,ProducerName)
%20and%20substringof(%27<ProducerCode>%27,ProducerCode)
```

Producer - Get Entity

Use this method to get the details of a producer of a group quote.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Producers</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a producer of a group quote, add the following fragment to the request URL used by the HTTP Get method:

```
/Producers
```

Prerequisites

The `ProducerName` or `ProducerCode` is provided.

4.11 Producer Contact

Definition

This entity type represents a producer contact of a group quote.

Note

This is a shared entity type with individual quotes.

Business Context and Use

This entity type provides the basic set of properties that define a producer contact of a group quote.

Associated SOA Operations

Not applicable

Implemented Methods

Producer Contact - Get Entity Set

Use this method to get a set of producer contacts.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Producers('<ProducerId>')/ProducerContacts</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- DateOfBirth
- Email
- FaxNumber
- FirstName
- Gender
- LastName
- MiddleInitial
- OtherGivenName
- PhoneNumber
- ProducerContactId
- Title
- Producer
 - LanguageCode
 - MailingAddress
 - PhysicalAddress
 - ProducerCode
 - ProducerContacts
 - ProducerId
 - ProducerName

Sorting

The following properties can be used for sorting:

- DateOfBirth
- Email
- FaxNumber
- FirstName
- Gender
- LastName
- MiddleInitial
- OtherGivenName
- PhoneNumber
- ProducerContactId
- Title
- Producer
 - LanguageCode
 - MailingAddress
 - PhysicalAddress
 - ProducerCode
 - ProducerContacts
 - ProducerId
 - ProducerName

Use of the Method

To get a set of producer contacts, add the following fragment to the request URL used by the HTTP Get method:

```
/Submissions
```

Producer Contact - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/ProducerContacts(' <ProducerContactId> ')?$expand=Producer
```

Producer Contact - Get Entity

Use this method to get the details of a producer contact.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/ProducerContacts(' <ProducerContactId> ')</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a producer contact, add the following fragment to the request URL used by the HTTP Get method:

```
/ProducerContacts(' <ProducerContactId> ')
```

Prerequisites

The `ProducerContactId` is provided.

Producer Contact - Create Entity

Use this method to create a producer contact.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/ProducerContacts</code>
Mode	Synchronous
Idempotency	Yes

Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To create a producer contact, add the following fragment to the request URL used by the HTTP POST method:

/ProducerContacts

The syntax of the parameters from HTTP POST Request is:

```
{
  Email: 'email',
  FirstName: 'first name',
  LastName: 'last name',
  Title: 'title',
  Producer: {
    LanguageCode: code,
    MailingAddress: object,
    PhysicalAddress: object,
    ProducerCode: code id,
    ProducerContacts: object,
    ProducerId: ProducerId,
    ProducerName: ProducerName,
  }
}
```

Producer Contact - Update Entity

Use this method to update a producer contact.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/ProducerContacts('<ProducerContactId>')</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Fields updated: <ul style="list-style-type: none"> • Email • Title • FirstName • LastName • PhoneNumber • FaxNumber
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To update a producer contact, add the following fragment to the request URL used by the HTTP PUT method:

```
/ProducerContacts('<ProducerContactId>')
```

The syntax of the parameters from HTTP PUT Request is:

```
{
  Email: 'email',
  FirstName: 'first name',
  LastName: 'last name',
  Title: 'title',
  FaxNumber: 'fax number',
  PhoneNumber: 'phone number',
}
```

4.12 Product

Definition

This entity type represents a product.

Note

This is a shared entity type with individual quotes.

Business Context and Use

This entity type provides the basic set of properties that define a product.

Associated SOA Operations

Not applicable

Implemented Methods

Product - Get Entity Set

Use this method to get a set of products.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Products</code>
----------------	--

Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	<p>The following properties can be used as filters:</p> <ul style="list-style-type: none"> • ProductId • ProductDisplayName • ProductCode • ProductName • ProductVersion • LanguageCode • GroupProduct • QuickQuoteProduct • TemplateIdForMaster
Sorting	<p>The following properties can be used for sorting:</p> <ul style="list-style-type: none"> • ProductId • ProductDisplayName • ProductCode • ProductName • ProductVersion • LanguageCode • GroupProduct • QuickQuoteProduct • TemplateIdForMaster

Use of the Method

To get a set of products, add the following fragment to the request URL used by the HTTP Get method:

```
/Products
```

To get the products of all languages, add the following fragment to the request URL used by the HTTP Get Method:

```
/Products?filterByLanguage=false
```

Product - Get Entity

Use this method to get the details of a product.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Products</code>
Mode	Synchronous

Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a product, add the following fragment to the request URL used by the HTTP Get method:

```
/Products
```

Product - Get Quote Type - Function Imports

Use this method to get a quote type list.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/getQuoteType</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get a quote type list, add the following fragment to the request URL used by the HTTP GET method:

```
/getQuoteType
```

The complex type list of quote type from HTTP GET Response is:

```
{
  [
    {
      PmdType: PMD Type,
      PmdDes: PMD Description
    }
  ]
}
```

4.13 Quote Option

Definition

This entity type represents the quote option list.

Business Context and Use

This entity type provides the basic set of properties that define a quotation quote option.

Associated SOA Operations

Not applicable

Implemented Methods

Quotation Quote Option - Get Entity Set

Use this method to get a set of quote options.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/QuoteOptions</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- QuoteOptionNumber
- Status
- ReadOnly
- ReferencePMDId
- ReferencePMDTypeCode
- PmdTypeCode
- PmdTypeDes
- Submission
 - TODO
- PremiumBreakdowns
 - TODO
- UnderwriterDecision
 - TODO
- Contract
 - TODO
- QuoteLetterBeforeUW
- PolicyStartDate
- PolicyEndDate

Sorting

The following properties can be used for sorting:

- QuoteOptionNumber
- Status
- ReadOnly
- ReferencePMDId
- ReferencePMDTypeCode
- PmdTypeCode
- PmdTypeDes
- Submission
 - To Related Document
- PremiumBreakdowns
 - To Related Document
- UnderwriterDecision
 - To Related Document
- Contract
 - To Related Document
- QuoteLetterBeforeUW
- PolicyStartDate
- PolicyEndDate

Use of the Method

To get a set of quote option, add the following fragment to the request URL used by the HTTP Get method:

```
/QuoteOptions?$filter=SubmissionId%20eq%20<SubmissionId>L
```

Quotation Quote Option - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/QuoteOptions(<SubmissionId>$expand=Submission, PremiumBreakdowns, UnderwriterDecision, Contracts
```

Quotation Quote Option - Get Entity

Use this method to get the details of a quote option.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/QuoteOptions(<Quote Option ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a quote option, add the following fragment to the request URL used by the HTTP Get method:

```
/QuoteOptions(<Quote Option ID>)
```

Prerequisites

The `Quote Option ID` is provided.

Quotation Quote Option - Display Illustrations - Function Imports

Use this method to display illustrations.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/displayIllustrations</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Display Illustrations
Filtering	Not applicable

Sorting Not applicable

Use of the Method

To display illustrations, add the following fragment to the request URL used by the HTTP Get method:

`/displayIllustrations?quoteOptionId=<Quote Option ID>`

Prerequisites

The `Quote Option ID` is provided.

Quotation Quote Option - View Quote Letter - Function Imports

Use this method to view Quote Letter.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/viewQuoteLetter</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	View Quote Letter
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To view Quote Letter, add the following fragment to the request URL used by the HTTP Get method:

`/viewQuoteLetter?quoteOptionId=<Quote Option ID>`

Prerequisites

The `Quote Option ID` is provided.

Quotation Quote Option - Make Quote Not Taken - Function Imports

Use this method to make quote not taken.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/makeQuoteNotTaken</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Make Quote Not Taken
Filtering	Not applicable

Sorting Not applicable

Use of the Method

To make quote not taken, add the following fragment to the request URL used by the HTTP Get method:

/makeQuoteNotTaken?quoteOptionId=<Quote Option ID>

Prerequisites

The Quote Option ID is provided.

Quotation Quote Option - Copy Quote - Function Imports

Use this method to copy quote.

Technical Data

Technical Name	http://<quo_app_url>/quo/odata.svc/copyQuote
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Copy Quote
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To copy quote, add the following fragment to the request URL used by the HTTP Get method:

/copyQuote?quoteOptionId=<Quote Option ID>

Prerequisites

The Quote Option ID is provided.

Quotation Quote Option - Issue Policy - Function Imports

Use this method to issue policy.

Technical Data

Technical Name	http://<quo_app_url>/quo/odata.svc/issuePolicy
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Issue Policy
Filtering	Not applicable

Sorting Not applicable

Use of the Method

To issue policy, add the following fragment to the request URL used by the HTTP Get method:

`/issuePolicy?quoteOptionId=<Quote Option ID>`

Prerequisites

The `Quote Option ID` is provided.

Quotation Quote Option - Find Quote Option Status - Function Imports

Use this method to find quote option status.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/findQuoteOptionStatus</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Find Quote Option Status
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To find quote option status, add the following fragment to the request URL used by the HTTP Get method:

`/findQuoteOptionStatus?quoteOptionId=<Quote Option ID>`

Prerequisites

The `Quote Option ID` is provided.

Quotation Quote Option - Get Multi-Currency Category - Function Imports

Use this method to get multi-currency category.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/getMultiCurrencyCategory</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Get Multi-Currency Category
Filtering	Not applicable

Sorting	Not applicable
---------	----------------

Use of the Method

To get multi-currency category, add the following fragment to the request URL used by the HTTP Get method:

```
/getMultiCurrencyCategory?quoteOptionId=<Quote Option ID>
```

Prerequisites

The `Quote Option ID` is provided.

Quotation Quote Option - Convert Quick Quote to Full Quote - Function Imports

Use this method to convert quick quote to full quote.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/convertQuickQuoteToFullQuote</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Convert Quick Quote to Full Quote
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To convert quick quote to full quote, add the following fragment to the request URL used by the HTTP Get method:

```
/convertQuickQuoteToFullQuote?quoteOptionId=<Quote Option ID>
```

Prerequisites

The `Quote Option ID` is provided.

Quotation Quote Option - Get Eapp Layout Name - Function Imports

Use this method to get eapp layout name.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/getEappLayoutName</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Get Eapp Layout Name
Filtering	Not applicable

Sorting Not applicable

Use of the Method

To get eapp layout name, add the following fragment to the request URL used by the HTTP Get method:

```
/getEappLayoutName?pmdId=<Quote Option ID>
```

Prerequisites

The `Quote Option ID` is provided.

Quotation Quote Option - Get Quote Letter Before UW Config - Function Imports

Use this method to get quote letter before UW config.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/getQuoteLetterBeforeUWConfig</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Get Quote Letter Before UW Config
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get quote letter before UW config, add the following fragment to the request URL used by the HTTP Get method:

```
/getQuoteLetterBeforeUWConfig?quoteOptionId=<Quote Option ID>
```

Prerequisites

The `Quote Option ID` is provided.

Quotation Quote Option – Update CBC Status Code - Function Imports

Use this method to update the CBC status of a quote option.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/updateCBCStatusCode</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Update Quote Option Cash Before Cover (CBC) status
Filtering	Not applicable

Sorting

Not applicable

Use of the Method

To update the CBC status of a quote option, add the following fragment to the request URL used by the HTTP Get method:

```
/updateCBCStatusCode?  
applicationNumber=<applicationNumber>&cbcStatusCode=<cbcStatusCode>
```

Prerequisites

A valid `applicationNumber` is provided. A Quote Option must exist with the specified `applicationNumber` assigned to it.

A valid `cbcStatusCode` is provided. Valid values are `REC` (payment received) and `EXP` (payment period expired).

4.14 Submission

Definition

This entity type represents a submission of a group quote.

Note

This is a shared entity type with individual quotes.

Business Context and Use

This entity type provides the basic set of properties that define a group quote.

Associated SOA Operations

Not applicable

Implemented Methods

Submission - Get Entity Set

Use this method to get a set of submissions.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Submissions</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- SubmissionId
 - EffectiveDate
 - CreationDate
 - ExpirationDate
 - SubmissionNumber
 - SubmissionStatus
 - TransactionType
 - ReadOnly
 - DerivedSubmissionStatus
 - GroupAgreementId
 - SubmissionTypeCode
 - Product
 - TODO
 - Producer
 - LanguageCode
 - MailingAddress
 - PhysicalAddress
 - ProducerCode
 - ProducerContacts
 - ProducerId
 - ProducerName
 - ProducerContact
 - DateOfBirth
 - Email
 - FaxNumber
 - FirstName
 - Gender
 - LastName
 - MiddleInitial
 - OtherGivenName
 - PhoneNumber
 - Producer
 - ProducerContactId
 - Title
 - QuoteOptions
 - TODO
 - WorkingUser
 - TODO
 - LeadId
 - PolicyId
-

Sorting

The following properties can be used for sorting:

- SubmissionId
- EffectiveDate
- CreationDate
- ExpirationDate
- SubmissionNumber
- SubmissionStatus
- TransactionType
- ReadOnly
- DerivedSubmissionStatus
- GroupAgreementId
- SubmissionTypeCode
- Product
 - TODO
- Producer
 - LanguageCode
 - MailingAddress
 - PhysicalAddress
 - ProducerCode
 - ProducerContacts
 - ProducerId
 - ProducerName
- ProducerContact
 - DateOfBirth
 - Email
 - FaxNumber
 - FirstName
 - Gender
 - LastName
 - MiddleInitial
 - OtherGivenName
 - PhoneNumber
 - Producer
 - ProducerContactId
 - Title
- QuoteOptions
 - TODO
- WorkingUser
 - TODO
- LeadId
- PolicyId

Use of the Method

To get a set of submissions, add the following fragment to the request URL used by the HTTP Get method:

```
/Submissions
```

Submission - Get Expand (\$expand)

Use this method to get a set of navigation attributes.

Use of the Method

To get a set of navigation attributes, add the following fragment to the request URL used by the HTTP Get method:

```
/Submissions(<Submission ID>)?$expand=Product
```

Submission - Get Entity

Use this method to get the details of a submission.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Submissions(<Submissions ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a submission, add the following fragment to the request URL used by the HTTP Get method:

```
/Submissions(<Submission ID>)
```

Prerequisites

The `Submission ID` is provided.

Submission - Update Entity

Use this method to update a group quote.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Submissions(<Submission ID>)</code>
Mode	Synchronous
Idempotency	Yes

Change / Update Behavior

Fields updated:

- EffectiveDate
- ExpirationDate
- Product
 - TODO
- Producer
 - LanguageCode
 - MailingAddress
 - PhysicalAddress
 - ProducerCode
 - ProducerContacts
 - ProducerId
 - ProducerName
- ProducerContact
 - DateOfBirth
 - Email
 - FaxNumber
 - FirstName
 - Gender
 - LastName
 - MiddleInitial
 - OtherGivenName
 - PhoneNumber
 - Producer
 - ProducerContactId
 - Title
- LeadId
- PolicyId

Filtering

Not applicable

Sorting

Not applicable

Use of the Method

To update a group quote, add the following fragment to the request URL used by the HTTP Put method:

```
/Submissions(<Submission ID>)
```

Prerequisites

The specified group quote is updated.

4.15 Submission Worklist

Definition

This entity type represents the group case list.

Business Context and Use

This entity type provides the basic set of properties that define an quotation group case.

Associated SOA Operations

Not applicable

Implemented Methods

Submission Worklist - Get Entity Set

Use this method to get a set of group cases.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/SubmissionWorkListSet</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

The following properties can be used as filters:

- AccountName
- AccountNo
- Address
- CreationDate
- EffectiveDate
- ProducerContactName
- ProductDisplayName
- ReadOnly
- SubmissionNumber
- SubmissionStatus
- DerivedSubmissionStatus
- SubmissionTypeCode
- Underwriter
- WorkingUserName
- WorkingUserLoginId
- IsDeletable
- PolicyId
- MasterPolicyId

Sorting

The following properties can be used for sorting:

- AccountName
- AccountNo
- Address
- CreationDate
- EffectiveDate
- ProducerContactName
- ProductDisplayName
- ReadOnly
- SubmissionNumber
- SubmissionStatus
- DerivedSubmissionStatus
- SubmissionTypeCode
- Underwriter
- WorkingUserName
- WorkingUserLoginId
- IsDeletable
- PolicyId
- MasterPolicyId

Use of the Method

To get a set of group cases, add the following fragment to the request URL used by the HTTP Get method:

```
/SubmissionWorkListSet?$filter=((substringof(%27<SubmissionId>%27,SubmissionNumber)  
%20eq%20true))
```

Submission Worklist - Get Entity

Use this method to get the details of a submission.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/ SubmissionWorkListSet(<SubmissionId>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a submission, add the following fragment to the request URL used by the HTTP Get method:

```
/SubmissionWorkListSet(<SubmissionId>)
```

Prerequisites

The `SubmissionId` is provided.

Submission Worklist - Get All Submission Status - Function Imports

Use this method to get all submission status.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/getAllSubmissionStatuses</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get all submission status, add the following fragment to the request URL used by the HTTP Get method:

```
/getAllSubmissionStatuses
```

Submission Worklist - Get All Submission Types - Function Imports

Use this method to get all submission types.

Technical Data

Technical Name	<code>http://<quo_app_url>/uw/odata.svc/getAllSubmissionTypes</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get all submission types, add the following fragment to the request URL used by the HTTP Get method:

```
/getAllSubmissionTypes
```

4.16 Task

Definition

This entity type represents a submission of a group quote.

Note

This is a shared entity type with individual quotes.

Business Context and Use

This entity type provides the basic set of properties that define a group quote.

Associated SOA Operations

Not applicable

Implemented Methods

Task - Get Entity Set

Use this method to get a set of tasks.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Tasks</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	<p>The following properties can be used as filters:</p> <ul style="list-style-type: none">• SubmissionId• AssigneeName• AssigneeId• Subject• Description• DueDate• CreatedDate• LastUpdateDate• Priority• Mandatory• Status• Owner• SubmissionNumber
Sorting	<p>The following properties can be used for sorting:</p> <ul style="list-style-type: none">• SubmissionId• AssigneeName• AssigneeId• Subject• Description• DueDate• CreatedDate• LastUpdateDate• Priority• Mandatory• Status• Owner• SubmissionNumber

Use of the Method

To get a set of tasks, add the following fragment to the request URL used by the HTTP Get method:

/tasks

Task - Get Entity

Use this method to get the details of a task.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Tasks(<Task ID>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To get the details of a task, add the following fragment to the request URL used by the HTTP Get method:

/Tasks(<Task ID>)

Prerequisites

The Task ID is provided.

Task - Update Entity

Use this method to update a task.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/Tasks(<Task ID>)</code>
Mode	Synchronous
Idempotency	Yes

Change / Update Behavior

Fields updated:

- AssigneeId
- Description
- Priority
- Status
- Subject
- Mandatory
- SubmissionId
- Owner
- DueDate
- LastUpdateDate
- CreatedDate

Filtering

Not applicable

Sorting

Not applicable

Use of the Method

To update a task, add the following fragment to the request URL used by the HTTP Put method:

`/Tasks(<Task ID>)`

Prerequisites

The specified task ID is updated.

4.17 Underwriter Decision

Definition

This entity type represents an underwriter decision.

Business Context and Use

This entity type provides the basic set of properties that define a decision.

Associated SOA Operations

Not applicable

Implemented Methods

Decision - Get Entity Set

Use this method to get a set of decisions from Product Content. You can filter or sort the returned entities by specifying properties as needed.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/UnderwriterDecisions</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	The following properties can be used as filters: <ul style="list-style-type: none">• <code>DecisionComment</code>• <code>DecisionReason</code>• <code>DecisionStatus</code>• <code>DecisionCode</code>• <code>DecisionMadeBy</code>• <code>RuleResult</code>• <code>CaseId</code>
Sorting	The following properties can be used for sorting: <ul style="list-style-type: none">• <code>DecisionComment</code>• <code>DecisionReason</code>• <code>DecisionStatus</code>• <code>DecisionCode</code>• <code>DecisionMadeBy</code>• <code>RuleResult</code>• <code>CaseId</code>

Use of the Method

To get a set of decisions from Product Content, add the following fragment to the request URL used by the HTTP Get method:

```
/UnderwriterDecisions(QuoteOptionId=<Case Id>)&$filter=(Name=<>)
```

Note

This is just an example. For filtering and sorting, you can use other properties as needed.

Prerequisites

The `Case Id` is provided.

Underwriter Decision - Submit for Underwriting - Function Imports

Use this method to submit for underwriting.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/submitForUnderwriting</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To submit for underwriting, add the following fragment to the request URL used by the HTTP Get method:

```
/submitForUnderwriting?quoteOptionId=<Quote Option ID>&submissionId=<Submission ID>
```

Prerequisites

The `Quote Option ID` and `Submission ID` are provided.

Underwriter Decision - Submit for Underwriting - Function Imports

Use this method to submit for underwriting.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/submitForUnderwriting</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To submit for underwriting, add the following fragment to the request URL used by the HTTP Get method:

```
/submitForUnderwriting?quoteOptionId=<Quote Option ID>&submissionId=<Submission ID>
```

Prerequisites

The `Quote Option ID` and `Submission ID` are provided.

Underwriter Decision - Submit for Underwriting - Function Imports

Use this method to submit for underwriting.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/submitForUnderwriting</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To submit for underwriting, add the following fragment to the request URL used by the HTTP Get method:

```
/submitForUnderwriting?quoteOptionId=<Quote Option ID>&submissionId=<Submission ID>
```

Prerequisites

The `Quote Option ID` and `Submission ID` are provided.

Underwriter Decision - Simulate for Underwriting - Function Imports

Use this method to simulate for underwriting.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/simulateForUnderwriting</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To simulate for underwriting, add the following fragment to the request URL used by the HTTP Get method:

```
/simulateForUnderwriting?quoteOptionId=<Quote Option ID>&submissionId=<Submission ID>
```

Prerequisites

The `Quote Option ID` and `Submission ID` are provided.

Underwriter Decision - Simulate Underwriter Decision - Function Imports

Use this method to simulate underwriter decision.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/simulateUnderwriterDecision</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To simulate underwriter decision, add the following fragment to the request URL used by the HTTP Get method:

```
/simulateUnderwriterDecision?quoteOptionId=<Quote Option ID>&decision=<Decision>
```

Prerequisites

The `Quote Option ID` and `Decision` are provided.

Underwriter Decision - Underwriter Needs More Info - Function Imports

Use this method to underwriter needs more info.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/odata.svc/underwriterNeedsMoreInfo</code>
Mode	Synchronous
Idempotency	No
Change / Update Behavior	Not applicable
Filtering	Not applicable
Sorting	Not applicable

Use of the Method

To underwriter needs more info, add the following fragment to the request URL used by the HTTP Get method:

```
/underwriterNeedsMoreInfo?quoteOptionId=<Quote Option ID>
```

Prerequisites

The `Quote Option ID` is provided.

5 Change Business OData Model

Definition

This Entity Data Model (EDM) includes the OData model definition for change business.

Business Context and Use

This EDM provides OData models for change business.

Corresponding Project

The implementation of quotation OData services is based on Olingo.

Entity Types

The topics contained in this chapter indicate the available entity types.

Error Handling

For all methods of the entity types above, in case of failure, the methods return the following information to the UI:

- The main error messages from the failed associated by Java library: Olingo
- The individual error categories from the failed associated by Java library: Olingo
- The following OData error message categories:
 - Technical exceptions: could be errors of service communication or missing parameters.
 - Business exceptions: error messages from the back-end system concerning the issue.

5.1 FS-PM Application

Definition

This entity represents an FS-PM application.

Business Context and Use

This entity type provides the basic set of properties that define an FS-PM application.

Associated SOA Operations

Not applicable

Implemented Methods

N/A

Technical Data

Properties

ApplicationNo

SubmissionNo

PolicyNo

Type

Status

EffectiveDate

ProcessingDate

ProcessedBy

5.2 FS-PM Policy

Definition

This entity represents an FS-PM policy.

Business Context and Use

This entity type provides the basic set of properties that define an FS-PM policy.

Associated SOA Operations

Not applicable

Implemented Methods

FSPM Policy - Get Entity Set

Use this method to get an FS-PM policy.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/cov/odata.svc/FSPMPolicy(<policyId>)</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable

Filtering

One of the following properties is required:

- PolicyNo
- EffectiveDate
- PolicyStatus
- InceptionDate
- ExpirationDate
- SalesProduct
- PolicyHolder
- PolicyHolderAddress
- Representative
- RepresentativeAddress
- AvailableForChangeBusiness

Sorting

The following properties can be sorted:

- PolicyNo
- EffectiveDate
- PolicyStatus
- InceptionDate
- ExpirationDate
- SalesProduct
- PolicyHolder
- PolicyHolderAddress
- Representative
- RepresentativeAddress
- AvailableForChangeBusiness

Navigation Property

FSPMApplicationSet'

5.3 FS-PM Policy Work Item

Definition

This entity represents an FS-PM policy work item.

Business Context and Use

This entity type provides the basic set of properties that define an FS-PM policy work item.

Associated SOA Operations

Not applicable

Implemented Methods

FSPM Policy Work Item - Get Entity Set

Use this method to get an FS-PM policy work item.

Technical Data

Technical Name	<code>http://<quo_app_url>/quo/cov/odata.svc/FSPMPolicyWorkItemSet</code>
Mode	Synchronous
Idempotency	Yes
Change / Update Behavior	Not applicable
Filtering	One of the following properties is required: <ul style="list-style-type: none">• PolicyNo• BusinessPartnerId
Sorting	The following properties can be sorted: <ul style="list-style-type: none">• PolicyNo• Status• InceptionDate• ExpirationDate• Role• RoleCode• ProductName• BusinessPartnerId
Navigation Property	FSPMTransactionWorkItemSet

5.4 FS-PM Transaction Work Item

Definition

This entity represents an FS-PM Transaction Work Item.

Business Context and Use

This entity type provides the basic set of properties that define an FS-PM Transaction Work Item.

Associated SOA Operations

Not applicable

Implemented Methods

N/A

Technical Data

Properties

TransactionNo

PolicyNo

Type

Status

EffectiveDate

ProcessingDate

6 Change Business OData Operations

6.1 DeclineAllChangeOptions

This function import is used by Runtime FS-QUO OData service to decline all change options in a submission for a coverage-based product.

Request

URI: <quo_app_url>/csiroot/ipw/quo/cov/odata.svc/DeclineAllChangeOptions

Operation Type: Function

HTTP Method: *GET*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	No	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
submissionId	Yes	String	The submission id for the change option.	Request body

Request Example

```
<quo_app_url>/csiroot/ipw/quo/cov/odata.svc/DeclineAllChangeOptions?  
optionId='<submissionId>'
```

Response

Response Status and Error Codes

Code	Reason	Description
200	The request has succeeded	N/A
500	Internal server error	Error message for failure reason

Response Payload Example

Returns string with success message indicating successful decline all request or error message.

6.2 DeclineChangeOption

This function import is used by Runtime FS-QUO OData service to decline a change option in a submission for a coverage-based product.

Request

URI: `<quo_app_url>/csiroot/ipw/quo/cov/odata.svc/DeclineChangeOption`

Operation Type: Function

HTTP Method: *GET*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	No	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
optionId	Yes	String	The quote option id for the change option.	Request body

Request Example

```
<quo_app_url>/csiroot/ipw/quo/cov/odata.svc/DeclineChangeOption?  
optionId='<optionId>'
```

Response

Response Status and Error Codes

Code	Reason	Description
200	The request has succeeded	N/A
500	Internal server error	Error message for failure reason

Response Payload Example

Returns string with success message indicating successful decline all request or error message.

6.3 ReviewChangeOption

This function import is used by Runtime FS-QUO OData service to review a change option in a submission for a coverage-based product.

Request

URI: `<quo_app_url>/csiroot/ipw/quo/cov/odata.svc/ReviewChangeOption`

Operation Type: Function

HTTP Method: *GET*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	No	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
optionId	Yes	String	The quote option id for the change option.	Request body

Request Example

```
<quo_app_url>/csiroot/ipw/quo/cov/odata.svc/ReviewChangeOption?  
optionId='<optionId>'
```

Response

Response Status and Error Codes

Code	Reason	Description
200	The request has succeeded	N/A
500	Internal server error	Error message for failure reason

Response Payload Example

Returns string with success message indicating successful review request or error message.

```
{"hasErrors":<true or false>}
```

6.4 StartChangeBusiness

This function import is used by Runtime FS-QUO OData service to start a change business transaction for a coverage-based product.

Request

URI: `<quo_app_url>/csiroot/ipw/quo/cov/odata.svc/StartChangeBusiness`

Operation Type: Function

HTTP Method: *GET*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	No	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
policyNumber	Yes	String	The policy number to start change business on.	Request body
effectiveDate	Yes	Date/Time	The policy number to start change business on.	Request body

Parameter	Required	Data Type	Description	Parameter Type
changeReason	No	String	The reason to start a change business transaction.	Request Body

Request Example

```
<quo_app_url>/csiroot/ipw/quo/cov/odata.svc/StartChangeBusiness?
policyNumber=<'policyNumber'>&effectiveDate=datetime'<effectiveDate'>
```

Response

Response Status and Error Codes

Code	Reason	Description
200	The request has succeeded	N/A
500	Internal server error	Error message for failure reason

Response Payload Example

Returns the submission id and the quote option id of the change business transaction created.

```
{ "d": { "StartChangeBusiness": { "__metadata":
{ "type": "com.sap.fs.quo.cov.web.odata.model.ChangeOptionWorkItem" }, "SubmissionId"
: "<SubmissionId>", "QuoteOptionId": "<QuoteOptionId>" } } }
```

7 Product Web Services

7.1 autoCreateAndUnderwriteQuotationWS

Overview

This SOAP service creates a quote and get an underwriting decision. This API is only used by auto products.

Location

► [<marketable_product>](#) ► [Configuration](#) ► [Integration](#) ► [Product Web Services](#) ► [Product Web Services](#) ►

Input

The following input data is required:

- AGENT_USER_ID
- The complete ABDA model policy image

ⓘ Note

Keep in mind that eApp validation checks implemented in FS-QUO need to be successful. You need to ensure that the correct quote/application data is sent so that no errors are triggered on the quote.

Output

If this service is successful, the response contains the values of the following tables:

- ACCOUNT
- POLICY_QUOTE
- POLICY_TXN
- ABDAPOLICY

7.2 issuePolicyWS

Overview

This service issues an open quotation that has a status of Approved or Quoted.

Optionally, this service can also update payment details.

Location

► [<marketable_product>](#) ► [Configuration](#) ► [Integration](#) ► [Product Web Services](#) ► [Product Web Services](#) ►

Input Parameters

The following input data is required:

- QUOTE_ID
- Optionally, payment information under ABDAPRMPAYR, starting from ABDAPOLPR, can be used as input data

Output

If successful, this service returns a policy number.

If unsuccessful, this service returns error messages.

7.3 pcCreateAndUnderwriteQuotationWS

Overview

This service creates a quote and get an underwriting decision. This API is only used by PnC products.

Location

▶ <marketable_product> ▶ Configuration ▶ Integration ▶ Product Web Services ▶ Product Web Services ▶

Input

The following input data is required:

- AGENT_USER_ID
- The complete ABDAMODEL policy image

Note

Keep in mind that eApp validation checks implemented in FS-QUO need to be successful. You need to ensure that the correct quote/application data is sent so that no errors are triggered on the quote.

Output

The response contains the values of the following tables:

- Account
- POLICY_QUOTE
- POLICY_TXN
- ABDAPOLICY

8 FS-QUO UI OData Services

8.1 EApp OData Service

The `EApp OData Service` is built using the FS-PRO OData framework (`PQMODataLibrary`).

Overview

The `EApp OData Service` allows the EApp UI to retrieve UI metadata for client-side rendering and persist data.

OData Version: 2.0

Root URI: `<quo_runtime_app_url>/ipw/eApp/odata.svc`

Permissions: Permission is configurable

Entity Data Model

The `EApp OData Service` OData Entity Data Model (EDM) is composed of both dynamic and static elements. The dynamic elements of the EDM are configurable via the Product Data Model (data definition model) while the static elements are provided as-is by the service EDM provider.

Entity Types

The following entity types are used by the Runtime OData EDM for the `EApp OData Service`.

Product

Represents Product entities in the Product Modeler.

Property Name	Type	Description
ProductId (Key)	Int64	Internal ID (PK_ID) of the Product.
Name	String	Name of the Product.
Version	Int32	Product version number.

Property Name	Type	Description
LanguageCode	String	Display language of the Product.
ModifierTypeCode	String	Modifier type code of the product.
ModifierTypeDescription	String	Modifier type description of the product.
Owner	String	Name of user who currently owns the product.
ModifiedBy	String	Name of user who last modified the product.
CreatedOn	DateTime	When the Product was created.
LastModifiedOn	DateTime	When the Product was last modified.
PublishEnabled	Boolean	Indicator determining if the Product can be published.
AssembledComponentSet	NavigationProperty: AssembledComponent Entity Type	Set of AssembledComponent entities associated with the Product. Internally in FS-PRO, this is the flattened list of components, which have been assembled into a specific Product
ScheduledActivitySet	NavigationProperty: ScheduledActivity Entity Type	Set of ScheduledActivity entities associated with the Product.

AssembledComponent

Represents component-type nodes that are assembled into product nodes in the Product Modeler.

Property Name	Type	Description
AssembledComponentId (Key)	String	Internal assembled component node identifier. Internally, this is a composite key made up of the IDs of all components in the component hierarchy for the AssembledComponent entity.
ProductId	Int64	Internal ID (PK_ID) of the Product that the component is assembled into.
Name	String	Assembled Component Name
Version	Int32	Assembled Component Version

Property Name	Type	Description
EntityTypeName	String	Formatted name of the Assembled-Component.
CompVersionId	Int64	Internal ID of the standalone component object the AssembledComponent is modeled from.
XPath	String	Assembly path of component within the product structure.
ModifierTypeCode	String	Modifier Type Code of the Assembled-Component.
ModifierTypeDescription	String	Modifier Type Description of the AssembledComponent.
IsInherited	Boolean	Indicator determining if the Assembled-Component was inherited as part of a parent Product structure.

ScheduledActivity

Property Name	Type	Description
ScheduleActivityId (Key)	Int64	Internal scheduled activity unique identifier. (PK_ID)
Name	String	Product Name and version.
RequestTime	DateTime	Scheduled activity request time.
CompleteTime	DateTime	Scheduled activity completion time.
SubmittedBy	String	User who triggered the request.
Status	String	Status of the request (COMPLETED, ERROR)
Config	String	Configuration information.
Log	String	Logging information.
RequestType	String	Request type (PUBLISH, DEPLOY)
ProductId	Int64	Internal ID of the Product the scheduled activity is executing for.

RuntimeEnvironment

Property Name	Type	Description
RuntimeEnvironmentId (Key)	String	Internal runtime environment unique identifier.
Description	String	Description of the target environment. e.g "Development", "User Acceptance Testing", "Production".
ServerUrl	String	Server URL of the target environment.
Name	String	Name of the Target Environment.
PermissionRequired	String	Permission required to publish/deploy to target environment.
ImplementationClass	String	Implementation Class for the EJB

Complex Types

The following tables list the complex types used by the Runtime OData EDM for the `EApp` OData Service.

EAppLayoutSection

Property Name	Type	Description
Name	String	Name of the configured eApp layout section in the product.
Description	String	Description of the configured eApp layout section in the product.
TargetEApp	String	Name of EApp to render in EApp view.
TargetStaticViewName	String	Name of the static view to render.
SectionOrder	Int32	Order of the configured eApp layout section in the product. This value is intended to be used to sort the eApp layout sections in the front end application.
NavigationType	String	Navigation type of the configured eApp layout section in the product. This value is intended to be used by the front end application to determine whether section is intended to be rendered as an eApp or as a static view. Value is either "eApplication" or "static".
Icon	String	Abstract value intended to represent the icon for the eApp layout section in a list or table of contents context. For out of the box configuration, this is the SAP icon name. For example, "sap-icon://product".

Property Name	Type	Description
PrimaryEntityType	String	Name of the primary entity type associated bound static view. This value is used by the generic Risk view in the Manage Quote Option app to render the risk view for a given risk-based entity type.

DropDownItem

Property Name	Type	Description
Code	String	Code for drop down item.
Description	String	Description of drop down item.

DisplayAction

Property Name	Type	Description
ControllId	String	Id of the control the display action will be applied on.
ActionName	String	Name of action to be applied.

Service Metadata URI: `<quo_runtime_app_url>/ipw/eApp/odata.svc/$metadata/`

8.1.1 Function Imports

8.1.1.1 GetEAppLayoutSectionSet

This function import is used by the Runtime OData EDM for the `EApp OData Service`. It gets the collection of `eAppLayoutSection` for a given product and master data object context.

Request

URI: `<quo_runtime_app_url>/ipw/eApp/odata.svc/GetEAppLayoutSectionSet`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
eAppTouchpointName	Yes	String	The name of eApp touchpoint.	Request body
masterTableName	Yes	String	The name of master data object, which configured display and description rules are executed against.	Request body
masterId	Yes	Int64	The PK_ID of master data object.	Request body

8.1.1.2 GetEApplication

This function import is used by the Runtime OData EDM for the `EApp OData Service`. It returns the eApplication model in stringified JSON format.

Request

URI: `<quo_runtime_app_url>/ipw/eApp/odata.svc/GetEApplication`

Operation Type: Function

HTTP Method: `POST`

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
eApplicationName	Yes	String	The name of eApp	Request body
masterTableName	Yes	String	The name of master data object, which rules are executed against.	Request body

Parameter	Required	Data Type	Description	Parameter Type
masterId	Yes	Int64	The PK_ID of master data object.	Request body

8.1.1.3 ValidateScreen

This function import is used by the Runtime OData EDM for the `EApp OData Service`. It executes validation rules for a given screen and data object context. Any errors are returned as a collection of `AppError` entities.

Request

URI: `<quo_runtime_app_url>/ipw/eApp/odata.svc/ValidateScreen`

Operation Type: Function

HTTP Method: `POST`

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
screenId	Yes	Int64	The ID of the screen	Request body
masterTableName	Yes	String	The name of master data object, which rules are executed against.	Request body
masterId	Yes	Int64	The PK_ID of master data object.	Request body

8.1.1.4 RunCalcRulesForScreen

This function import is used by the Runtime OData EDM for the `EApp OData Service`. It execute calculation rules for a given screen and data object context. If execution is successful, will return "SUCCESS". Otherwise, will return standard OData error response wrapping any server error..

Request

URI: `<quo_runtime_app_url>/ipw/eApp/odata.svc/RunCalcRulesForScreen`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
screenId	Yes	Int64	The ID of the screen.	Request body
masterTableName	Yes	String	The name of master data object, which rules are executed against.	Request body
masterId	Yes	Int64	The PK_ID of master data object.	Request body
calcRuleType	Yes	String	Indicates the calculation rule type (PRE, FORM, POST).	Request body

8.1.1.5 RunDisplayRulesForEApp

This function import is used by the Runtime OData EDM for the `EApp OData Service`. It execute all display and content rules configured for a given eApp and data object context. The resulting display actions are returned as a collection of DisplayAction complex types.

Request

URI: `<quo_runtime_app_url>/ipw/eApp/odata.svc/RunDisplayRulesForEApp`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
eApplicationName	Yes	String	The name of eApp (e.g Common Schedule).	Request body
masterTableName	Yes	String	The name of master data object, which rules are executed against.	Request body
masterId	Yes	Int64	The PK_ID of master data object.	Request body

8.2 QUO (Static) OData Service

The `QUO OData Service` is built using the FS-PRO OData framework (`PQMDataLibrary`). It provides the back-end for the FS-QUO UI5 apps

Overview

The `QUO OData Service` allows the EApp UI to retrieve UI metadata for client-side rendering and persist data.

OData Version: 2.0

Root URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc`

Permissions: Permission is configurable

Entity Data Model

The `EApp OData Service` OData Entity Data Model (EDM) is composed of both dynamic and static elements. The dynamic elements of the EDM are configurable via the Product Data Model (data definition model) while the static elements are provided as-is by the service EDM provider.

Entity Types

The following entity types are used by the Runtime OData EDM for the `EApp OData Service`.

Entity Name: **NewBusinessPolicyTransaction**

Entity Set: **NewBusinessPolicyTransactionSet**

Property Name	Type	Description
PolicyTransactionId	Int64	A unique numeric identification of the policy transaction.
TransactionInfo	ComplexType	Contains common information among transactions such as dates, identifiers and statuses.
CommissionPercentage	Decimal	The percentage of commission given to the associated producer for the policy transaction.
CreatedBy	String	The underwriter or underwriter assistant that created the policy transaction.
Account	Navigation	The account associated to the policy transaction.
Producer	Navigation	The broker agency or individual agent that initiated the sales/quotation process with the customer.
ProducerContact	Navigation	The contract of the producer that can be reached for inquiries related to sales/quotation/customer of the policy transaction.
Product	Navigation	The sales product that is used for quotation of the policy transaction.
QuoteOptionSet	Navigation	The quote options for the policy transaction.

Entity Type: **PolicyTransactionWorkItem**

Entity Type: **PolicyTransactionWorkItemSet**

Property Name	Type	Description
PolicyTransactionNo	Int64	A unique numeric identification of the policy transaction.
AccountName	String	The name of the account associated to the policy transaction.

Property Name	Type	Description
Type	String	The type code that reflects the type of the transaction.
Status	String	A status code that reflects the current state of the policy transaction.
EffectiveDate	DateTime	When the policy transaction becomes/became active.
CreationDate	DateTime	When the policy transaction was created.
ProductName	String	The sales product name that is used for quotation of the policy transaction.
WorkingUser	String	The working user's name, formatted as <Last>, <First>
ProducerName	String	The producer's name
ProducerContact	String	The producer contact's name, formatted as <Last>, <First>

Entity Type: **Producer**

Entity Type: **ProducerSet**

Property Name	Type	Description
ProducerId	Int64	A unique numeric identification of the producer
ProducerName	String	The name of the producer
ProducerCode	String	The code associated to the producer
FirstLineAddress	String	
SecondLineAddress	String	
FirstLineHouseNumber	String	
SecondLineHouseNumber	String	
City	String	
StateCode	String	
PostalCode	String	

Property Name	Type	Description
CountryCode	String	
CommissionPercentage	Double	The percentage of commission given to the associated producer for the policy transaction.
ProducerContactSet	Navigation	The set of Producer Contacts that are associated with the Producer

Entity Type: **ProducerContact**

Entity Type: **ProducerContactSet**

Property Name	Type	Description
ProducerContactId	String	A unique numeric identifier for the producer contact
Title	String	The title for addressing the producer contact
FirstName	String	The first name of the producer contact
OtherGivenName	String	The nickname or other given names of the producer contact.
LastName	String	The surname or last name of the producer contact
MiddleInitial	String	The middle initial of the producer contact
DateOfBirth	String	The date of birth of the producer contact
Gender	String	The gender, if specified, of the producer contact
PhoneNumber	String	The phone number of the producer contact
FaxNumber	String	The fax number of the producer contact
Email	String	The email address of the producer contact
Producer	Navigation	The producer that this producer contact is associated with

Entity Type: **Product**

Entity Type: **ProductSet**

Property Name	Type	Description
ProductId	String	The unique string identifier for the product
ProductCode	String	The code of the product
ProductName	String	The name of the product
ProductVersion	String	The version number of the product
DisplayName	String	The product name displayed in the UI

Entity Type: **Account**

Entity Type: **AccountSet**

Property Name	Type	Description
AccountId	Int64	A unique numeric identifier for the account
AccountNumber	String	Externally generated unique identifier for the account. (Generated with FS-BP on)
AccountName	String	The name identified with the account
FirstName	String	The first name of the person which the account is identified with (Only used for Individual accounts)
LastName	String	The last name of the person which the account is identified with (Only used for Individual accounts)
LegalEntityCode	String	An entity which identifies what legal entity the account represents (ie. Individual, Corporation, etc.)
PhoneNumber	String	The telephone number of the account.
FirstLineAddress	String	
SecondLineAddress	String	
City	String	
StateCode	String	
PostalCode	String	
CountryCode	String	
EmailAddress	String	The email address of the account.
Website	String	The website associated with the account.

Entity Type: **UserAccount**

Entity Type: **UserAccountSet**

Property Name	Type	Description
UserAccountId	Long	The unique ID identifying the user account.
LoginName	String	The login name associated with the user account.
FirstName	String	The first name of the user.
LastName	String	The last name of the user.

Entity Type: **QuoteOption**

Entity Type: **QuoteOptionSet**

Property Name	Type	Description
QuoteOptionId	Int64	The unique ID identifying the quote option.
Status	String	The quote option's quote option status code.
ProductName	String	The quote option's product
ProductVersion	String	The quote option product's version

Supported Operations

Entity Type	Save	Create	Read	Update	Delete
NewBusinessPolicyTransaction	Yes	Yes	Yes	Yes	Yes
PolicyTransaction-WorkItem	Yes	No	Yes	No	No
Account	Yes	Yes	Yes	Yes	Yes
Producer	Yes	Yes	Yes	Yes	Yes
Product	Yes	No	Yes	No	No
Producer Contact	Yes	Yes	Yes	Yes	Yes
UserAccount	Yes	No	Yes	No	No
QuoteOption	No	No	Yes	No	No

Complex Types

This table lists the complex types used by the Runtime OData EDM for the `QUO` OData Service.

Property Name	Type	Description
SubmissionNumber	String	A reference number for the policy transaction.
Status	String	A status code that reflects the current state of the policy transaction.
EffectiveDate	DateTime	The date when the policy transaction becomes/became active.
ExpirationDate	DateTime	The date when the policy transaction becomes/became expired.
CreationDate	DateTime	The date when the policy transaction was created.
UnderwriterId	Int64	The working user id of the current transaction.
UnderwriterOfRecordId	Int64	The underwriter of record if for the current transaction.
Type	String	The type of the current transaction (i.e. NEWBUS).
IsReadOnly	Boolean	If the transaction is editable or in a read-only state.
IsSignedAppReceived	Boolean	If a sign applicate has been received.
SignedAppReceivedDate	DateTime	The date when

Service Metadata URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/$metadata/`

8.2.1 Function Imports

8.2.1.1 SubmitQuote

This function import is used by the Runtime OData EDM for the `quo_odata` service. It performs the required actions to process a quote:

It can perform the following actions:

- Validation
- Coverage Group Selection
- Coverage Selection
- Update Reference Info
- Form Attachment
- Rating
- Premium Handling
- Referrals

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/SubmitQuote`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
quoteOptionId		String		Request body

8.2.1.2 GetLoggedInUserAccount

This function import is used by the Runtime OData EDM for the `QUO OData Service`. It uses the QUO Service Manager to obtain the user information

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/GetLoggedInUserAccount`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
-----------	----------	-----------	-------------	----------------

8.2.1.3 BindQuoteOption

This function import is used by the Runtime OData EDM for the `QUO OData Service`. It gets the collection of `eAppLayoutSection` for a given product and master data object context..

This function import binds the specified quote option of the policy transaction and returns a generated policy number. It performs the following actions:

- Bind display sequence number by updating DeltaTracker table
- Generate policy number
- Set selected option letter
- Run book service if it is necessary(can be customized)
- Update quote option status to "Bound"
- Update current policy transaction status to "Bound"
- Clean up unbound options

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/BindQuoteOption`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
<code>Accept</code>	Yes	application/json
<code>Authorization</code>	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
<code>policyTransacitonId</code>	Yes	String		Request body
<code>quoteOptionId</code>	Yes	String		Request body

8.2.1.4 CopyQuoteOption

This function import is used by the Runtime OData EDM for the `QUO OData Service`.

This function import copies the given quote option of the policy transaction to a new quote option entity with blank premium values. It can perform the following actions:

- Clone the specified quote option
- Initialize the premium values of a copied quote option by setting the value to zero
- Set the expiration date of the copied quote option to blank
- Set the description of the copied quote option to empty
- Update the status of the copied quote option to "Working"

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/CopyQuoteOption`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
policyTransacitonId	Yes	String		Request body
quoteOptionId	Yes	String		Request body

8.2.1.5 RemoveQuoteOption

This function import is used by the Runtime OData EDM for the `QUO OData Service`. It gets the collection of `eAppLayoutSection` for a given product and master data object context..

This function import removes the given quote option of the policy transaction. It performs the following actions:

- Throws `InvalidSubmissionStatusError` if the policy transaction status is not "Submitted", "Created", or "Quoted"

- Throws `ObjectNotFoundError` if the quote option id or policy transaction id does not map to an entity
- Throws `InvalidRemoveOptionError` if the policy transaction does not have at least one quote option

The quote option will not be removed if it has the status of "Quoted", "Referred", "Bound", or "Issued".

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/RemoveQuoteOption`

Operation Type: Function

HTTP Method: `POST`

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
policyTransacitonId	Yes	String		Request body
quoteOptionId	Yes	String		Request body

8.2.1.6 MarkQuoteOptionAsQuoted

This function import is used by the Runtime OData EDM for the `QUO OData Service`.

This function import marks a given quote option of the policy transaction as "Quoted" and changing status of policy transaction as "Quoted". It performs the following actions:

- Updates a given quote option status to "Quoted"
- Sets a quote option's expiration date to the policy transaction's expiration date
- Updates a given policy transaction status to "Quoted"
- Throws `InvalidQuoteStatusError` if given quote option status is not "Submitted" or "Overridden" or when given policy transaction status is not "Submitted"

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/MarkQuoteOptionAsQuoted`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
policyTransacitonId	Yes	String	The name of eApp touchpoint.	Request body
quoteOptionId	Yes	String	The name of master data object, which configured display and description rules are executed against.	Request body

8.2.1.7 ReassignNewBusinessTransaction

This function import is used by the Runtime OData EDM for the `QUO OData Service`.

This function import reassigns the transaction to the user with the given id, making them the working user for the specified transaction. It performs the following actions:

- Creates the `POLICY_ACTIVITY_LOG` for the reassignment
- Creates the new `TRANSACTION_PARTY_ROLE` record for the new working user, and expires the previous active record
- Updates the `SubmissionData` and `POLICY_TXN` `working_user_id` and `prev_working_user_id`
- Throws `ObjectNotFoundError` if either the user id or policy transaction id do not map to a valid entity

Operations are only completed if no `ObjectNotFoundError` errors are thrown, and the `userId` is not equal to the current working user id.

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/ReassignNewBusinessTransaction`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
policytransactionid	Yes	String		Request body
userid	Yes	String		Request body

8.2.1.8 GetPolicyTransactionStatusList

This function import is used by the Runtime OData EDM for the `QUO OData Service`. It returns a list of status codes for policy transactions as strings (i.e. CRE).

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/GetPolicyTransactionStatusList`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

None

Return Type

8.2.1.9 GetPolicyTransactionTypeList

This function import is used by the Runtime OData EDM for the `QUO OData Service`. It returns a list of types for policy transactions as strings (i.e. NEWBUS)

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/GetPolicyTransactionTypeList`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

None

Return Type

8.2.1.10 IssuePolicy

This function import is used by the Runtime OData EDM for the `QUO OData Service`.

This function import issues the new business policy using the transaction's "Bound" quote option. It performs the following actions:

- Throws `ObjectNotFoundError` or `SearchError` if the policy transaction id does not map to an entity
- Throws an `InvalidSubmissionStatusError` if the policy status is not "Bound"
- Throws a `TransactionMissingBoundOptionExecutionError` if the policy does not have a quote option with a "Bound" status

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/IssuePolicy`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
policyTransactionId	Yes	String		Request body

8.2.1.11 ApplyReferralRules

This function import is used by the Runtime OData EDM for the `QUO OData Service`.

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/ApplyReferralRules`

Operation Type: Function

HTTP Method: `POST`

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
policyTransacitonId	Yes	String		Request body
quoteOptionId	Yes	String		Request body

8.2.1.12 ValidateAll

This function import is used by the Runtime OData EDM for the QUO OData Service.

Request

URI: `<quo_runtime_app_url>/ipw/quo/web/odata.svc/ValidateAll`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters

Parameter	Required	Data Type	Description	Parameter Type
quoteOptionId	Yes	String		Request body

8.3 Quote Summary OData Service

The Quote Summary OData Service is built using the FS-PRO OData framework (PQMDataLibrary).

Overview

The Quote Summary OData Service allows the

OData Version: 2.0

Root URI: `<quo_runtime_app_url>/ipw/quoteSummary/odata.svc`

Permissions: Permission is configurable

Entity Data Model

The `Quote Summary OData Service` OData Entity Data Model (EDM) dynamic, meaning that the schema is dependent on the given policy transaction and product context. For example, the schema for the `Quote Summary OData` service in `Mock Commercial General Liability Monoline V1` may be different from the `Quote Summary OData` service for `Mock Commercial General Liability Monoline V2`.

Entity Types

The following entity types are used by the Runtime OData EDM for the `Quote Summary OData Service`.

QuoteSummary

Property Name	Type	Description	Annotation
OptionId (Key)	Int64	Key property of the entity type. Represents the Quote Option ID.	sap:label="Option Id" sap:visible="false"
SeqNo	Int32	The sequence number associated with the Quote Option. This is a non-zero, positive integer value.	sap:label="Sequence No." sap:visible="true"
Status	String	Status code associated with the Quote Option.	sap:label="Status" sap:visible="true"
Description	String	Some text describing the Quote Option.	sap:label="Description" sap:visible="true"
<DynamicColumn1>	<EdmType>	<Configured Option Summary Grid Column 1>	sap:label="<Configured Option Summary Grid Column 1 Heading>" sap:visible="true" Scale="1"
<DynamicColumn2>	<EdmType>	<Configured Option Summary Grid Column 2>	sap:label="<Configured Option Summary Grid Column 2 Heading>" sap:visible="true"

Service Metadata URI: `<quo_runtime_app_url>/ipw/eApp/odata.svc/$metadata/`

8.3.1 Function Imports

8.3.1.1 UpdateQuoteOptionDescription

This function import is used by the Runtime OData EDM for the `Quote Summary OData Service`. It updates the description attribute of a target Quote Option entity.

Request

URI: `<quo_runtime_app_url>/ipw/quoteSummary/odata.svc/UpdateQuoteOptionDescription`

Operation Type: Function

HTTP Method: *POST*

Permissions: Permission is configurable

Request Headers

Header	Required	Values
Accept	Yes	application/json
Authorization	Yes	Basic username/password

Request Parameters



None

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