

Annual Spread Driver

User Flow & Touchpoint Specification

Page	Screens	Flow Type	Status
Annual Spread Demo	16 artboards	Driver Configuration	Ready for Prototype

1. Overview

The Annual Spread driver allows users to allocate a target dollar amount across months within a budget plan. This document captures every screen state, UI touchpoint, trigger condition, and navigation transition for use in building a new interactive prototype.

HOW TO USE THIS DOCUMENT · Each section below maps to one artboard. For every screen you will find: (1) a state description, (2) a touchpoint table listing every interactive element with its trigger and destination, and (3) a state delta showing what changed from the previous screen. Use these to wire frames in Figma, ProtoPie, or any prototyping tool.

Flow Summary

The full flow across 16 screens breaks down into four phases:

#	Screen Name	Type	Key Action	Outcome
001	blank	SCREEN	Entry point — empty driver row	Budget table visible, no driver
002	blank INLINE menu	OVERLAY	Click ●●● row action menu	Inline actions appear
003	blank INLINE menu options	OVERLAY	Hover / expand menu	Driver type options revealed
004	blank dropdown	OVERLAY	Click "Annual Spread" option	Driver type selector opens
005	Annual Spread	SCREEN	Select driver type	Config panel opens
006	Account dropdown	OVERLAY	Click account selector	Account list opens
007	1 acct selected	SCREEN	Select one account	Dept picker revealed
008	3 acct 5 dept selected	SCREEN	Select multiple accts + depts	Full selection confirmed

#	Screen Name	Type	Key Action	Outcome
009	results	SCREEN	Close selector / apply	Panel shows with accounts set
010	info icon	OVERLAY	Hover ⓘ icon	Tooltip with 3 config options
011	years dropdown	OVERLAY	Click Fiscal Years field	Year picker dropdown opens
012	dropdown results	SCREEN	Year selected	More Options section visible
013	120000	SCREEN	Enter annual target value	Value \$120,000 entered
014	monthly dropdown	OVERLAY	Click Monthly Allocation field	Spread method options open
015	dropdown results	SCREEN	Select monthly method	All inputs complete
016	saved	SCREEN	Click SAVE	Driver applied, formula bar shown

Persistent UI Chrome (All Screens)

These elements are present on every screen and are not repeated in individual screen sections below.

UI Element	Type	Trigger	Next State / Screen
Left nav — Drivers	Nav link	Click	Stays on Drivers section
Left nav — other sections	Nav link	Click	Navigate away from driver flow
Top bar — Budget heading	Page title	Click v	Budget section dropdown
Top bar — ☰ menu	Icon button	Click	Page-level options menu
Top bar — Share button	CTA button	Click	Share / export modal
Top bar — Comment icon	Icon button	Click	Comments panel
Top bar — Alert icon	Icon button	Click	Alerts / notifications panel
Top bar — Help icon	Icon button	Click	Help / documentation panel
Top bar — User menu	Dropdown	Click	Account / workspace switcher
OpEx section header	Row header	Click v	Collapse / expand OpEx rows
Dept: Sales & Marketing	Filter chip	Click	Filter table to this department
Add New Driver button	CTA button	Click	Opens driver creation panel
Table column headers	Sortable col	Click	Sort table by that column
Horizontal scroll bar	Scrollbar	Drag / click	Scroll months left / right

2. Screen-by-Screen Specification

001 blank — Budget table, no driver assigned

The starting state. The OpEx budget table is fully loaded with historical actuals. The Wages and Salaries row has no driver applied — the driver cell shows a '...' placeholder or empty state. No configuration panel is open.

Touchpoints

UI Element	Type	Trigger	Next State / Screen
Row action menu (⋮)	Icon button	Click / hover on any row	→ Screen 002: Inline menu appears
Add New Driver	CTA button	Click	Opens driver type selector at bottom
Wages and Salaries row	Table row	Click cell	Cell selection / highlight state
Account column cell	Table cell	Click	Editable inline input
Column month headers	Sort target	Click	Sort by month value
Dept filter chip	Filter	Click	Filter rows by department
Horizontal scrollbar	Scrollbar	Drag	Reveal more months

PROTOTYPE NOTE · This is the entry point for the flow. All other screens return here on Cancel or after Save.

002 blank INLINE menu — Row action menu open

User clicks the ⋮ icon on the Wages and Salaries row. A small floating action menu appears inline on that row. The rest of the table remains visible but inactive.

What changed from Screen 001

Element	Previous State	This State
Row ⋮ button	Default / hidden	Highlighted / active
Inline action menu	Hidden	Visible — floating above row
Background table	Fully interactive	Dimmed / click-outside to dismiss

Touchpoints

UI Element	Type	Trigger	Next State / Screen
Inline menu — appears	Floating menu	Triggered by ⋮ click	Menu visible with action items

UI Element	Type	Trigger	Next State / Screen
Click outside menu	Dismiss target	Click anywhere outside	→ Screen 001: Menu closes
Escape key	Keyboard	Press Esc	→ Screen 001: Menu closes
Menu item (expand)	Menu item	Hover / click	→ Screen 003: Options revealed

003 blank INLINE menu options — Driver type options visible

The inline menu expands to show available driver types. The visible option is 'Growth on Historicals' — implying a submenu or list of driver types. This is the decision point where the user picks which driver to assign.

What changed from Screen 002

Element	Previous State	This State
Inline menu	Compact / collapsed	Expanded — shows driver type list
Driver type options	Hidden	Visible: Growth on Historicals (+ others implied)

Touchpoints

UI Element	Type	Trigger	Next State / Screen
"Growth on Historicals"	Menu option	Click	Opens Growth on Historicals flow (out of scope here)
"Annual Spread"	Menu option	Click	→ Screen 004: Annual Spread dropdown
Other driver type options	Menu options	Click	Opens respective driver flow
Click outside	Dismiss	Click outside menu	→ Screen 001: Menu closes
Escape key	Keyboard	Press Esc	→ Screen 001: Menu closes

004 blank dropdown — Driver type selector open

After clicking a driver option, a dropdown or secondary selector opens to confirm the driver type. The table data is still visible behind. 'Growth on Historicals' is listed as a visible option alongside 'Annual Spread'.

Touchpoints

UI Element	Type	Trigger	Next State / Screen
"Annual Spread" option	Dropdown item	Click	→ Screen 005: Annual Spread config panel

UI Element	Type	Trigger	Next State / Screen
"Growth on Historicals"	Dropdown item	Click	Opens Growth on Historicals flow
Other options in list	Dropdown items	Click	Opens respective driver flow
Click outside dropdown	Dismiss	Click outside	→ Screen 001: Returns to blank state
Escape key	Keyboard	Press Esc	→ Screen 001: Dismisses selector

005 Annual Spread — Configuration panel opens

The main Annual Spread driver configuration panel appears. It contains two major sections: a top bar with 'Select Accounts & Departments' and an 'Inputs' section with a 'More Options' expander. The budget table is visible but scrolled or pushed down.

Panel UI Elements

- Header: 'Driver Type: Annual Spread' label (implied from flow)
- 'Select Accounts & Departments' — primary action bar at top of panel
- 'Inputs' section — collapsed by default, contains configuration fields
- 'More Options' — expandable accordion for advanced settings
- SAVE button — primary CTA (visible from screen 009 onwards)
- Cancel / X button — dismisses panel

Touchpoints

UI Element	Type	Trigger	Next State / Screen
"Select Accounts & Departments"	Action button / bar	Click	→ Screen 006: Account dropdown opens
"Inputs" section	Accordion header	Click	Expand inputs (may already be open)
"More Options" expander	Accordion	Click	Reveals advanced config options
Close / X button	Icon button	Click	→ Screen 001: Panel dismissed, no save
Background table	Passive	Click outside	Possible dismiss — TBD behavior

006 Account dropdown — Account list open

User clicked 'Select Accounts & Departments'. A multi-level dropdown opens showing account categories (Travel, Employee Events, Wages and Salaries, Bonus). This is a searchable/filterable account picker.

Visible account options

- Travel
- Employee Events
- Wages and Salaries (pre-selected / highlighted)
- Bonus

Touchpoints

UI Element	Type	Trigger	Next State / Screen
Account row — "Wages and Salaries"	Selectable row	Click	→ Screen 007: Account selected, dept picker revealed
Account row — "Travel"	Selectable row	Click	Selects Travel, shows departments
Account row — "Bonus"	Selectable row	Click	Selects Bonus, shows departments
Account row — "Employee Events"	Selectable row	Click	Selects Employee Events
Multiple account selection	Multi-select	Click multiple	→ Screen 008: Multiple selected
Search / filter input	Text input	Type	Filters account list
Close dropdown	Dismiss	Click outside	→ Screen 005: Returns to panel
Escape key	Keyboard	Press Esc	→ Screen 005: Closes dropdown

007 1 acct selected — Single account, department picker visible

User selected one account (Wages and Salaries). The dropdown now shows a secondary level: a Departments picker. Available departments include: Select All, Sales & Marketing, R & D, Product, Ops, Unassigned, G & A.

What changed from Screen 006

Element	Previous State	This State
Account list	Full list visible	Wages and Salaries checked/selected
Dept section	Hidden	Visible — showing all departments
"Departments" label	Not present	Section header visible

Touchpoints

UI Element	Type	Trigger	Next State / Screen
"Select All" checkbox	Checkbox	Click	All departments selected at once
Department checkboxes (each)	Checkboxes	Click	Toggle individual department
"Sales & Marketing"	Checkbox row	Click	Selects S&M department
"R & D"	Checkbox row	Click	Selects R&D department
"Product"	Checkbox row	Click	Selects Product department
"Ops"	Checkbox row	Click	Selects Ops department
"Unassigned"	Checkbox row	Click	Selects unassigned rows

UI Element	Type	Trigger	Next State / Screen
"G & A"	Checkbox row	Click	Selects G&A department
Add more accounts (implied)	Action	Click back/+	→ Screen 006: Return to account list
Apply / Done (implied)	Action button	Click	→ Screen 009: Panel with accounts set

008 3 acct 5 dept selected — Multiple selections active

User selected 3 accounts and 5 departments. The dropdown shows the same UI as screen 007 but with multiple items checked. This is the complex selection state before confirming.

What changed from Screen 007

Element	Previous State	This State
Account selection count	1 account	3 accounts selected
Department checkboxes	0–1 checked	5 departments checked
Implied chips / summary	Not visible	May show selection count summary

Touchpoints

UI Element	Type	Trigger	Next State / Screen
Checked account rows	Checkboxes	Click to deselect	Removes account from selection
Checked dept checkboxes	Checkboxes	Click to deselect	Removes dept from selection
Apply / Done (implied)	Primary button	Click	→ Screen 009: Returns to panel with full selection
Clear all (implied)	Action link	Click	Resets all selections to none

009 results — Panel with accounts applied

The account/department dropdown has closed. The panel now shows the selected accounts reflected in the 'Select Accounts & Departments' bar (likely as chips or a count badge). The Inputs section is visible. The budget table below reflects the selection.

Touchpoints

UI Element	Type	Trigger	Next State / Screen
"Select Accounts & Departments" bar	Action bar	Click	→ Screen 006: Re-opens account picker
Account chips / selection summary	Chips	Click ×	Removes an account from selection
"Inputs" section header	Accordion	Click	Expand / collapse inputs
"More Options" expander	Accordion	Click	→ Screen 012: More Options revealed
① info icon (in header)	Icon	Hover	→ Screen 010: Tooltip opens
Fiscal Years field	Input	Click	→ Screen 011: Year picker opens

UI Element	Type	Trigger	Next State / Screen
Monthly Allocation field	Dropdown	Click	→ Screen 014: Spread method picker
Annual amount input (implied)	Number input	Click / type	Enter dollar value → Screen 013
SAVE button	CTA button	Click	→ Screen 016: Driver saved
Cancel button	Button	Click	→ Screen 001: Panel dismissed

010 info icon — Tooltip overlay

User hovers over the ⓘ icon. A tooltip appears explaining the Annual Spread driver's three configuration dimensions. The tooltip is informational only — no interactive elements inside it.

Tooltip content

- Label: 'Annual Spread'
- 1 — 'Monthly Allocation (unadjusted for actuals)'
- 2 — 'Fiscal Years'
- 3 — 'Adjust future allocation based on actuals'
- Toggle: 'Allow Manual Override'

Touchpoints

UI Element	Type	Trigger	Next State / Screen
ⓘ icon	Hover target	Mouse leave	→ Screen 009: Tooltip dismisses
Tooltip overlay	Informational	No interaction	Read-only content
Click outside	Dismiss	Click	→ Screen 009: Tooltip closes
"Allow Manual Override" toggle	Toggle (implied)	Click	Enables manual cell editing

011 years dropdown — Fiscal Year picker open

User clicked the Fiscal Years field. The panel now shows 'Driver Type: Annual Spread' in a header area. A year picker dropdown is open. The year selector allows the user to specify which fiscal year(s) the annual spread applies to.

Touchpoints

UI Element	Type	Trigger	Next State / Screen
Year option (e.g. FY2020)	Dropdown item	Click	→ Screen 012: Year selected, results shown
Year option (e.g. FY2021)	Dropdown item	Click	Selects 2021 fiscal year
Multi-year range (implied)	Range selector	Click start/end	Sets a span of fiscal years
Close dropdown	Dismiss	Click outside	→ Screen 009: Returns without change
Escape key	Keyboard	Press Esc	→ Screen 009: Dropdown dismissed

012 dropdown results — Year selected, More Options visible

A fiscal year has been selected. The panel now reveals the full 'More Options' section with three numbered configuration items: (1) Annual Spread, (2) Monthly Allocation (unadjusted for actuals), (3) Fiscal Years. The 'Adjust future allocation based on actuals' checkbox and 'Allow Manual Override' toggle are also visible.

What changed from Screen 011

Element	Previous State	This State
Fiscal Years field	Empty / unset	Selected year populated
More Options section	Collapsed	Expanded — items 1, 2, 3 visible
Config item 1: Annual Spread	Not visible	Visible with value field
Config item 2: Monthly Alloc	Not visible	Visible with dropdown
Config item 3: Fiscal Years	Not visible	Visible, populated with selected year
"Adjust future allocation"	Not visible	Checkbox visible
"Allow Manual Override"	Not visible	Toggle visible

Touchpoints

UI Element	Type	Trigger	Next State / Screen
Config item 1 — Annual Spread value	Number input	Click / type	→ Screen 013: Value entered
Config item 2 — Monthly Allocation	Dropdown	Click	→ Screen 014: Method picker opens

UI Element	Type	Trigger	Next State / Screen
Config item 3 — Fiscal Years	Dropdown/input	Click	→ Screen 011: Re-opens year picker
"Adjust future allocation" checkbox	Checkbox	Click	Toggle adjustment behavior
"Allow Manual Override" toggle	Toggle	Click	Enables per-cell overrides
SAVE button	CTA button	Click	→ Screen 016: Driver saved
Cancel button	Button	Click	→ Screen 001: Dismisses panel

013 120000 — Annual target value entered

User has typed \$120,000 into the annual spread value field. All three config items are now populated. The SAVE button should be active / enabled. This is the pre-save complete state.

What changed from Screen 012

Element	Previous State	This State
Annual Spread value field	Empty	\$120,000 entered
SAVE button	Disabled (implied)	Enabled — all required fields populated
Preview in table (implied)	Empty / dashes	May show live preview of spread values

Touchpoints

UI Element	Type	Trigger	Next State / Screen
Annual Spread value field	Number input	Click / clear / retype	Changes target value
Config item 2 — Monthly Allocation	Dropdown	Click	→ Screen 014: Method picker
Config item 3 — Fiscal Years	Dropdown	Click	→ Screen 011: Year picker
"Adjust future allocation" checkbox	Checkbox	Click	Toggle behavior
"Allow Manual Override" toggle	Toggle	Click	Toggle override permission
SAVE button	CTA button	Click	→ Screen 016: Saved
Cancel button	Button	Click	→ Screen 001: Dismissed

014 monthly dropdown — Monthly Allocation method picker open

User clicked the Monthly Allocation field (Config item 2). A dropdown opens with three spread method options numbered 1–3. The 'Annual Spread' and 'Fiscal Years' values remain populated behind the dropdown.

Dropdown options visible

- 1 — 'Monthly Allocation (unadjusted for actuals)' — default method
- 2 — (implied second method — e.g. weighted / proportional)
- 3 — (implied third method — e.g. adjusted for actuals)

Touchpoints

UI Element	Type	Trigger	Next State / Screen
Option 1 — Monthly Allocation	Dropdown item	Click	→ Screen 015: Method selected
Option 2	Dropdown item	Click	→ Screen 015: Alt method selected
Option 3	Dropdown item	Click	→ Screen 015: Alt method selected
Close dropdown	Dismiss	Click outside	→ Screen 013: Returns to form
Escape key	Keyboard	Press Esc	→ Screen 013: Dropdown dismissed

015 dropdown results — All inputs configured

The Monthly Allocation method has been selected. All three required inputs are now complete: Annual Spread value (\$120,000), Monthly Allocation method, and Fiscal Year. The More Options section shows the final configuration summary. The panel is ready to save.

What changed from Screen 014

Element	Previous State	This State
Monthly Allocation dropdown	Open	Closed — method selected
Config item 2 field	Empty / "select..."	Populated with chosen method
Form completion state	Partial	All required fields complete
SAVE button	May be disabled	Fully enabled

Touchpoints

UI Element	Type	Trigger	Next State / Screen
Any config field	Input / dropdown	Click	Re-opens respective picker to change value
SAVE button	Primary CTA	Click	→ Screen 016: Driver saved and applied
Cancel button	Button	Click	→ Screen 001: All changes discarded
Close / X button	Icon button	Click	→ Screen 001: Panel dismissed

016 saved — Driver applied, formula bar visible

User clicked SAVE. The configuration panel closes. The budget table now shows the Annual Spread driver applied to the Wages and Salaries row. A formula bar or inline summary appears showing the driver configuration. The row data is populated with calculated values (\$10,000/month implied from \$120,000 / 12).

Formula bar content (from layer data)

- Row label: 'Wages and Salaries (Sales & Ma...)'
- Formula line 1: 'Annual Spread: 120,000'
- Formula line 2: 'Monthly Allocation: Evenly split across months'
- Formula line 3: 'Fiscal Years: 2020'
- Driver name shown: 'Annual Spread'

What changed from Screen 015

Element	Previous State	This State
Config panel	Open	Closed / dismissed
Formula bar	Hidden	Visible below column headers
Row driver name	Empty	"Annual Spread" label appears on row
Month cells (row)	Dashes / empty	Populated: ~\$10,000 per month
Driver Name field	Not set	"Driver Name #22" (auto-generated name)
Table row count	N rows	Row may now show split sub-rows per dept

Touchpoints (post-save state)

UI Element	Type	Trigger	Next State / Screen
Formula bar — driver row	Clickable formula	Click	Re-opens driver config panel for editing

UI Element	Type	Trigger	Next State / Screen
Formula bar — account name	Link	Click	Filters / focuses to that account
Row ••• menu (on driver row)	Icon button	Click	Row actions: Edit, Clone, Delete driver
Row ••• → Edit	Menu action	Click	Re-opens Annual Spread config panel
Row ••• → Clone	Menu action	Click	Duplicates driver to another row
Row ••• → Delete	Menu action	Click	Confirmation modal → removes driver
Driver name "Driver Name #22"	Inline text	Double-click	Rename the driver inline
Month cells (driver row)	Table cells	Click (if override enabled)	Manual value entry
Add New Driver (other rows)	CTA button	Click	Starts new driver flow on different row

3. Component Inventory

All distinct UI components referenced across the 16 screens. Use this list to build your component library before wiring the prototype.

Component	Type	Behavior	Screens
Row action menu (•••)	Icon button	Hover/click to reveal inline actions	001-016
Inline action menu	Floating menu	Expands on ••• click, dismisses on outside	002-004
Driver type dropdown	Dropdown	Lists all driver types, opens config panel	003-004
Config panel	Slide-in panel	Full-width panel over table, scrollable	005-015
Select Accounts bar	Action bar	Opens multi-level account+dept picker	005-009
Account/dept picker	Multi-select	Hierarchical: accounts → departments	006-008
Selection chip	Chip / tag	Shows selected item, × to remove	007-009
① Info tooltip	Hover tooltip	Shows on hover, disappears on mouse-out	010
Inputs accordion	Accordion	Expand/collapse config fields section	005-016
More Options accordion	Accordion	Expand/collapse advanced settings	012-016
Fiscal Year picker	Dropdown	Year selector, single or range	011-016
Number input field	Text input	Numeric only, formats as currency	013-016
Monthly Allocation dropdown	Dropdown	3 spread method options	014-016
"Adjust actuals" checkbox	Checkbox	Toggle boolean setting	012-016
"Manual Override" toggle	Toggle switch	Enable/disable per-cell editing	010-016
SAVE button	Primary CTA	Disabled until required fields filled	009-016
Cancel button	Secondary btn	Discards all changes, closes panel	005-015
Formula bar	Info bar	Shows driver config summary after save	016
Budget table	Data grid	Scrollable, sortable, filterable	001-016
Dept filter chip	Filter	Click to filter table rows by dept	001-016

4. Prototype Wiring Guide

Use this section to connect frames in your prototyping tool. Each row represents one navigation connection.

From	Trigger Element	Interaction	To	Animation
001	••• icon on row	Click	002	Instant
002	Inline menu expand	Click / hover	003	Instant

From	Trigger Element	Interaction	To	Animation
003	"Annual Spread" option	Click	004	Instant
003	Other driver options	Click	Other flows	—
004	"Annual Spread" in dropdown	Click	005	Slide up
004	Click outside	Click	001	Instant
005	"Select Accounts..." bar	Click	006	Instant
005	Close / Cancel	Click	001	Slide down
006	Select 1 account	Click	007	Instant
007	Select more accounts	Click	008	Instant
007	Apply / done	Click	009	Instant
008	Apply / done	Click	009	Instant
008	Deselect account	Click	007	Instant
009	ⓘ info icon	Hover	010	Fade in
010	Mouse leave info icon	Hover end	009	Fade out
009	Fiscal Years field	Click	011	Instant
011	Select a year	Click	012	Instant
011	Click outside	Click	009	Instant
012	Enter value in amount field	Type	013	Instant
013	Monthly Allocation dropdown	Click	014	Instant
014	Select option 1	Click	015	Instant
014	Click outside	Click	013	Instant
015	SAVE	Click	016	Slide down + fade
015	Cancel	Click	001	Slide down
016	Formula bar click	Click	005	Slide up (edit mode)
016	••• → Delete driver	Click	001 (after confirm)	Fade

5. Notes & Open Questions

Things to verify before prototyping

- Does clicking 'Annual Spread' in screen 003 go directly to the config panel (skipping screen 004) or always via a type-confirmation dropdown?
- What are the exact 3 options in the Monthly Allocation dropdown (screen 014)? Only option 1 label is confirmed from layer data.
- Is the SAVE button visible from screen 005, or only after accounts are selected (screen 009)?
- What is the exact animation / transition when the config panel opens and closes?
- Does the budget table update live (real-time preview) as the user enters the \$120,000 value, or only after Save?
- The 'Allow Manual Override' toggle appears in both the tooltip (screen 010) and the More Options section (screen 012) — confirm if these are the same control.

- Screen 009 and 015 share the label 'dropdown results' — confirm both are distinct states and not duplicates.

Confirmed behaviors from layer data

- Final saved formula bar displays exactly: Annual Spread: 120,000 / Monthly Allocation: Evenly split across months / Fiscal Years: 2020
- Driver auto-names itself 'Driver Name #22' (or next available number) — user can rename inline
- After save, the Wages and Salaries row shows \$10,000 per month ($120,000 \div 12$)
- The account picker supports hierarchical multi-select: accounts first, then departments per account
- 'Select All' shortcut is available in the department picker

— End of document —