



 **STRATAFOLIO[®]**
OpEx/CAM Cloning Companion

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Overview

Operating Expenses (OpEx) represent the costs required to run and maintain the common areas of a commercial property, including real estate taxes, insurance, landscaping, snow removal, janitorial services, utilities, general repairs, and more.

These costs are billed to tenants based on their lease structure and pro-rata share. STRATAFOLIO allows you to enter OpEx/CAM amounts per lease, track them annually, and clone them forward each year to streamline your annual budgeting cycle.

Many users confuse Operating Expenses (OpEx) and Common Area Maintenance (CAM), thinking they are separate concepts or interchangeable terms. In reality, CAM is one part of OpEx, and STRATAFOLIO uses OpEx as the broader structure that includes CAM.

OpEx represents the full set of expenses required to operate and maintain a commercial property. CAM refers specifically to the maintenance and operational costs of shared areas. CAM is an important component of OpEx but it is not the whole picture.

Overview

CAM on its own does not include insurance or real estate taxes. In a traditional NNN structure, the three components are:

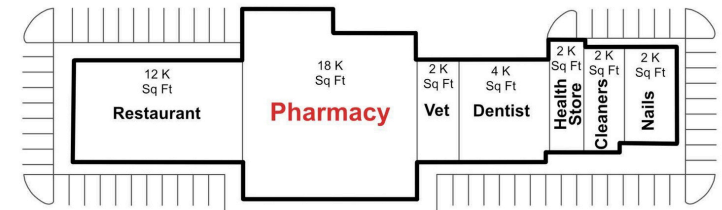
- Taxes
- Insurance
- CAM

Together, these three categories make up the full NNN charges billed to tenants, with CAM representing only one of the three parts.

CAM charges are shared by tenants based on their proportionate or pro-rata share of the property, as defined in their lease.

	N	NN	NNN
Expenses Tenants are Responsible For	Single	Double	Triple
Base Rent	✓	✓	✓
Real Estate Taxes	✓	✓	✓
Insurance		✓	✓
Common Areas Maintenance (CAM)			✓

Strip Mall Building



$$\text{Pro-Rata Share} = \left(\frac{\text{Unit (Rentable Sq Ft)}}{\text{Building (Total Rentable Sq Ft)}} \right) \times 100$$

Pro-rata share: the Tenant's share of the expenses of the buildings or asset

What Is Cloning in STRATAFOLIO?

Cloning in STRATAFOLIO is the process of copying an existing Operating Expense (OpEx) period, including CAM subcategories, from one period to the next.

This ensures every lease has a complete OpEx/CAM setup for the upcoming billing cycle.

Cloning:

- Duplicates all OpEx and CAM categories that already exist in the lease
- Carries forward billing amounts, structures, and prorated allocations
- Allows you to optionally apply increases (percentage or flat-dollar) during the cloning step
- Automatically creates the next period using the same structure as the period you selected

Because CAM (Common Area Maintenance) is part of OpEx, cloning ensures your CAM structure and values continue seamlessly into the new year.

Why Cloning is Important

Cloning OpEx ensures the next year begins with:

- A complete and accurate set of OpEx categories already created
- Previous or updated values carried forward for budgeting
- A consistent structure for OpEx or CAM billing
- Smooth alignment between billing and reconciliation
- Stable cash flow for owners and tenants

If OpEx is not cloned:

- Invoices will not generate accurately. There will be no OpEx on the invoice
- Tenants may be under-billed or over-billed
- Cash flow becomes unpredictable
- Year-end reconciliations become less accurate

Cloning is a required annual step to support accurate OpEx or CAM billing and reconciliation.

When to Clone OpEx

Cloning should be done:

- After the prior year's CAM reconciliation is complete
- Before generating the first invoice of the new OpEx period or calendar year
- As part of your annual budgeting workflow

This ensures OpEx estimates for the new period are based on the most recent year's performance.

Cash Flow Impact

OpEx amounts determine what is billed to tenants monthly.

If they are not updated:

- Tenants may underpay throughout the year
- Owners may need to cover unreimbursed expenses
- CAM reconciliations may show large variances
- Tenant disputes and cash flow inconsistencies may increase

Accurate cloning supports accurate billing, better forecasting, and smoother tenant communication.

Process

1 Navigate to the Operating Expenses Index View

From the left-hand navigation panel, go to:

**Operations →
Operating Expenses**

This opens the Operating Expenses Index View, where you can review all leases with existing OpEx periods.

Operating Expenses
New Leases must be added to a Unit.

ORGANIZATIONS: -- No Filter --
ENTITY NAMES: -- No Filter --
ASSETS: -- No Filter --
BUILDINGS ADDRESS: -- No Filter --
UNITS: -- No Filter --
TENANTS: -- No Tenants --
OPEX DATE: 11/24/2025
OPEX STATUS: -- No Filter --

Clone Selected OpEx | Confirm Lease OpEx | HIDE 3 CONFIRMED ROWS | Operating Expense Report

Excel | Report Settings

Confirmed	Entity Legal Name	Buildings Address	Unit #	Tenants	Use ACH	Lease Type	Lease Status	Lease Start Date	Lease End Date
<input type="checkbox"/>	Parker, LLC	3519 Partridge Parkway, Cedar Rapids, IA 52404	3A	The Bookstore	No	NNN	Occupied	01/01/2025	12/31/2027
<input type="checkbox"/>	Parker, LLC	5925 Prairie Road, North Liberty, IA 52317	100	Kwik-E-Mart	No	NNN	Occupied	01/01/2019	10/31/2029
<input type="checkbox"/>	Bird Real Estate, LLC	5200 Bluebird Road, Cedar Rapids, IA 52403	203	Betty Decker	No	NNN	Year-to-Year	02/01/2020	01/31/2024
<input type="checkbox"/>	Parker, LLC	3519 Partridge Parkway, Cedar Rapids, IA 52404	2A	Real Estate CPA Firm	No	NNN	Occupied	01/01/2020	12/31/2025
<input type="checkbox"/>	Lionfish Properties, LLC ★	4500 Lionfish Lane, Iowa City, IA 52240	102	Fleming Lawncare	No	NNN	Occupied	08/01/2015	11/30/2026
<input type="checkbox"/>	Bird Real Estate, LLC	200 Cardinal Road, Cedar Rapids, IA 52402	200	Tire Store	Yes	NNN	Occupied	04/01/2019	03/31/2029
<input type="checkbox"/>	Parker, LLC	3519 Partridge Parkway, Cedar Rapids, IA 52404	1A	Vince's Law Firm	No	NNN	Occupied	03/01/2019	02/28/2028
<input type="checkbox"/>	Bird Real Estate, LLC	100 Cardinal Road, Cedar Rapids, IA 52402	100	Pharmacy Store	No	NNN	Occupied	04/01/2019	12/31/2026

Showing 1 to 11 of 18 entries

Process

2 Identify the Lease(s) That Need a New OpEx Period

There are two ways to find the correct leases:

Option A — Use the OpEx Status Filter (Recommended)

1. At the top of the Operating Expenses table view, open the dropdown labeled OpEx Status.
2. Choose Missing Next OpEx Period.
 - This automatically filters to any lease that requires a new OpEx/CAM period.
3. Review the list and check the box next to the lease(s) you want to clone.

The screenshot displays the Stratafolio Operating Expenses interface. On the left is a sidebar with navigation options: Dashboards, Hierarchy, Properties, Operations (selected), Tenants, Leases, Tenant Insurance, Operating Expenses, Rent Collection, and Work Orders. The main area shows the 'Operating Expenses' table view with filters for Organizations, Entity Names, Assets, Buildings Address, Units, Tenants, and OpEx Date. The 'OpEx Status' dropdown is open, showing options: Confirmed OpEx (3), Cloned but not Confirmed (10), Missing OpEx for Selected Date (4), and Missing Next OpEx Period (9). The 'Missing Next OpEx Period (9)' option is selected. Below the filters, there are buttons for 'Clone Selected OpEx', 'Confirm Lease OpEx', 'HIDE 3 CONFIRMED ROWS', and 'Operating Expense Report'. A table of leases is displayed with columns: Confirmed, Entity Legal Name, Buildings Address, Unit #, Tenants, Use ACH, Lease Type, Lease Status, Lease Start Date, Lease End Date, OpEx Start Date, and OpEx End Date. The first column has checkboxes for selection. The table shows 14 entries, with the first 13 having checkboxes and the last one being 'Confirmed'. The status of the leases varies, including 'Occupied' and 'Year-to-Year'.

Confirmed	Entity Legal Name	Buildings Address	Unit #	Tenants	Use ACH	Lease Type	Lease Status	Lease Start Date	Lease End Date	OpEx Start Date	OpEx End Date
<input type="checkbox"/>	Parker, LLC	3519 Partridge Parkway, Cedar Rapids, IA 52404	3A	The Bookstore	No	NNN	Occupied	01/01/2025	12/31/2027	01/01/2025	12/31/2027
<input type="checkbox"/>	Parker, LLC	5925 Prairie Road, North Liberty, IA 52317	100	Kwik-E-Mart	No	NNN	Occupied	01/01/2019	10/31/2029	01/01/2025	12/31/2029
<input type="checkbox"/>	Bird Real Estate, LLC	5200 Bluebird Road, Cedar Rapids, IA 52403	203	Betty Decker	No	NNN	Year-to-Year	02/01/2020	01/31/2024	01/01/2025	12/31/2024
<input type="checkbox"/>	Parker, LLC	3519 Partridge Parkway, Cedar Rapids, IA 52404	2A	Real Estate CPA Firm	No	NNN	Occupied	01/01/2020	12/31/2025	01/01/2025	12/31/2025
<input type="checkbox"/>	Lionfish Properties, LLC ★	4500 Lionfish Lane, Iowa City, IA 52240	102	Fleming Lawncare	No	NNN	Occupied	08/01/2015	11/30/2026	01/01/2025	12/31/2026
<input type="checkbox"/>	Bird Real Estate, LLC	200 Cardinal Road, Cedar Rapids, IA 52402	200	Tire Store	Yes	NNN	Occupied	04/01/2019	03/31/2029	01/01/2025	12/31/2029
<input type="checkbox"/>	Parker, LLC	3519 Partridge Parkway, Cedar Rapids, IA 52404	1A	Vince's Law Firm	No	NNN	Occupied	03/01/2019	02/28/2028	01/01/2025	12/31/2028
<input type="checkbox"/>	Bird Real Estate, LLC	100 Cardinal Road, Cedar Rapids, IA 52402	100	Pharmacy Store	No	NNN	Occupied	04/01/2019	12/31/2026	01/01/2025	12/31/2026
<input type="checkbox"/>	Lionfish Properties, LLC ★	4500 Lionfish Lane, Iowa City, IA 52240	101	Acme Parts	No	NNN	Occupied	07/01/2015	06/30/2026	01/01/2025	12/31/2026
<input type="checkbox"/>	Bird Real Estate, LLC	100 Cardinal Road, Cedar Rapids, IA 52402	102	ABC Law Firm	No	NNN	Occupied	05/01/2020	04/30/2030	01/01/2025	12/31/2030
<input type="checkbox"/>	Parker, LLC	4925 Prairie Road, North Liberty, IA 52317	4925	Box Store	No	NNN	Occupied	01/01/2017	12/31/2027	01/01/2025	12/31/2027

Showing 1 to 14 of 18 entries

Process

2 Identify the Lease(s) That Need a New OpEx Period

Option B — Manually Filter by Date or Tenant

1. Use the filters at the top for Organization, Entity, Asset, Tenant, or Units to find the relevant lease.
2. Adjust the OpEx Date filter, if needed, to a date that the OpEx is in to clone over.
3. Select the checkbox next to the lease(s) you want to clone.

The screenshot displays the Stratafolio Operating Expenses interface. A red box highlights the filter section at the top, which includes fields for Organizations, Entity Names, Units, and Tenants. A calendar widget is open, showing December 2025, with the date 12/25/2025 selected. Below the filters, there are buttons for 'Clone Selected OpEx', 'Confirm Lease OpEx', and 'Operating Expense Report'. A table of leases is shown below, with a red box highlighting the first column containing checkboxes for selection.

Confirmed	Entity Legal Name	Buildings Address	Unit #	Tenants	Use ACH	Lease Type	Lease Status	Lease Start Date	Lease End Date
<input type="checkbox"/>	Parker, LLC	3519 Partridge Parkway, Cedar Rapids, IA 52404	3A	The Bookstore	No	NNN	Occupied	01/01/2025	12/31/2027
<input type="checkbox"/>	Parker, LLC	5925 Prairie Road, North Liberty, IA 52317	100	Kwik-E-Mart	No	NNN	Occupied	01/01/2019	10/31/2029
<input type="checkbox"/>	Bird Real Estate, LLC	5200 Bluebird Road, Cedar Rapids, IA 52403	203	Betty Decker	No	NNN	Year-to-Year	02/01/2020	01/31/2024
<input type="checkbox"/>	Parker, LLC	3519 Partridge Parkway, Cedar Rapids, IA 52404	2A	Real Estate CPA Firm	No	NNN	Occupied	01/01/2020	12/31/2025
<input type="checkbox"/>	Lionfish Properties, LLC ★	4500 Lionfish Lane, Iowa City, IA 52240	102	Fleming Lawncare	No	NNN	Occupied	08/01/2015	11/30/2026
<input type="checkbox"/>	Bird Real Estate, LLC	200 Cardinal Road, Cedar Rapids, IA 52402	200	Tire Store	Yes	NNN	Occupied	04/01/2019	03/31/2029
<input type="checkbox"/>	Parker, LLC	3519 Partridge Parkway, Cedar Rapids, IA 52404	1A	Vince's Law Firm	No	NNN	Occupied	03/01/2019	02/28/2028
<input type="checkbox"/>	Bird Real Estate, LLC	100 Cardinal Road, Cedar Rapids, IA 52402	100	Pharmacy Store	No	NNN	Occupied	04/01/2019	12/31/2026

Showing 1 to 11 of 18 entries

Process

3 Clone Selected OpEx

Click **Clone Selected OpEx**.

A confirmation window will appear.

If STRATAFOLIO detects issues:

- A pop-up will appear showing the error list. The clone button will not be clickable.
- Click the Download Errors button to export an Excel file.
- Review the explanation for each error.
- Correct the issues in the lease's OpEx tab (or lease details).
- Attempt the clone again.

Only after errors are resolved will the **Clone** button be clickable.

Operating Expenses
New Leases must be added to a Unit.

ORGANIZATIONS: -- No Filter -- ENTITY NAMES: -- No Filter -- ASSETS: -- No Filter -- BUILDINGS ADDRESS: -- No Filter --

UNITS: -- No Filter -- TENANTS: -- No Tenants -- OPEX DATE: 12/25/2025 OPEX STATUS: -- No Filter --

Clone Selected OpEx Confirm Lease OpEx HIDE & CONFIRMED ROWS Operating Expense Report

pharmacy

Excel Report Settings

Showing 1 to 1 of 1 entries 1

Clone Operating Expenses

If the selected Operating Expenses period extends past the lease end date, it will be shortened to end on the lease end date. The only exception is when the lease is month-to-month or year-to-year. In those cases, the period you are cloning will be copied using the same length as the selected period, even if it goes past the current lease end date.

If you need more information, please use the [AI Assistant](#) or visit the [Knowledge Base](#) for guidance.

Leases That Will Be Cloned	Leases That Will Not Be Cloned
✓ —	! 1

! 1 Expense will not be added due to errors. [Download Errors](#)

Clone Cancel

Process

4 Update OpEx Amounts

Once cloning is possible, you will see the cloning pop up with adjustment options:

You may increase OpEx amounts in one of two ways:

A) Increase by Percentage

- Apply a % increase to any of the four categories:
 - CAM
 - Insurance
 - Taxes
 - Other Expenses
- Subcategories under each will also adjust automatically.


B) Increase by Amount

- Add a dollar increase (ex: \$300/month) to any category.
- Again, subcategories update automatically.

⚠ You may choose either a percentage OR a dollar amount per category, not both.

If you leave a field blank, STRATAFOLIO keeps the same amount from the previous period. The amounts can be updated at a later date, and you can still proceed with the cloning process.

Review the entries then click the **Clone** button to proceed with cloning.



Clone Operating Expenses

If the selected Operating Expenses period extends past the lease end date, it will be shortened to end on the lease end date. The only exception is when the lease is month-to-month or year-to-year. In those cases, the period you are cloning will be copied using the same length as the selected period, even if it goes past the current lease end date.

If you need more information, please use the [AI Assistant](#) or visit the [Knowledge Base](#) for guidance.

Leases That Will Be Cloned

✔
1

Leases That Will Not Be Cloned

!
-

✔
Operating Expenses for 1 Lease will be cloned.

Update Operating Expense

Add a percentage or dollar amount you want to increase the monthly invoice amount for each category. These increases apply only to values greater than zero and to all subcategories within each category. If you leave a field blank, we will keep the same amount from the previous period.

These increases are optional during the cloning process. You can edit these amounts at any time after cloning them in the OpEx tab of the lease.

Increase By Percentage

Add a percentage to increase the selected category, including all sub-categories for the new period. Leave the field blank to keep the same amount as the previous period.

CAM	INSURANCE	TAXES	OTHER EXPENSES
% <input style="width: 100px; border: 1px solid #ccc;" type="text"/>	% <input style="width: 100px; border: 1px solid #ccc;" type="text"/>	% <input style="width: 100px; border: 1px solid #ccc;" type="text"/>	% <input style="width: 100px; border: 1px solid #ccc;" type="text"/>

Increase By Amount

Add a flat dollar amount to increase the selected category, including all sub-categories for the new period. Leave the field blank to keep the same amount as the previous period.

CAM	INSURANCE	TAXES	OTHER EXPENSES
\$ <input style="width: 100px; border: 1px solid #ccc;" type="text"/>	\$ <input style="width: 100px; border: 1px solid #ccc;" type="text"/>	\$ <input style="width: 100px; border: 1px solid #ccc;" type="text"/>	\$ <input style="width: 100px; border: 1px solid #ccc;" type="text"/>

If no increases are entered, all Operating Expense categories will carry forward unchanged from the previous period.

Clone

Cancel

Process

5 Verify the Newly Cloned OpEx Period

After completing the cloning process, you must verify that the new OpEx period was created correctly in the lease.

STRATAFOLIO provides a quick way to jump directly into the lease's OpEx tab using the ellipse (three dots) menu.

1. Use the Ellipse (...) to Open the Lease's OpEx Tab

On the Operating Expenses view:

- Locate the lease you just cloned.
- Click the ellipse (...) on the far-left of the row.
- Select View OpEx to open the OpEx tab for that specific lease.

2. Review the Newly Created Period

In the OpEx tab of the lease, verify that:

- The new OpEx period has been added
- The dates of the cloned period match the prior period's length
- All subcategories were included in the cloning
- Any percentage or flat-dollar increases (if used) are reflected
- Amounts being invoiced to the tenant are correct

Category	Subcategory	Controllable/Non-Controllable	Monthly Invoice Amount	Annual Amount (Per RSF)	Annual Invoice Amount	Period Cap Amount	Period Cap Restriction	Not to Exceed Per Period	OpEx Due
Taxes	Real Estate Taxes	N/A	\$5,700.00	\$3.42	\$68,400.00				
Insurance	Insurance	N/A	\$1,425.00	\$0.86	\$17,220.00				
CAM	Lawn Care and Landscaping	Controllable	\$142.00	\$0.09	\$1,704.00	5.00%	From Previous Period	\$1,789.20	
CAM	Property Management	Controllable	\$185.00	\$0.11	\$2,220.00	\$2,220.00		\$2,220.00	
CAM	Repairs & Maintenance	Controllable	\$890.00	\$0.53	\$10,680.00	5.00%	From Previous Period	\$11,214.00	
CAM	Snow Removal	N/A	\$170.00	\$0.10	\$2,040.00				
CAM	Trash Removal	N/A	\$100.00	\$0.06	\$1,200.00				
CAM	Utilities	N/A	\$516.67	\$0.31	\$6,200.00				

Important Note About Period Length

Cloning always creates a new OpEx period that matches the number of months in the prior period.

- If the previous period was a full year, the cloned period will also span a full year.
- If the previous period covered only part of a year (e.g., a new tenant mid-year), the cloned period will be cloned for the same number of months in the previous period

Process

6 Confirm the OpEx Period

Return to Operations →
Operating Expenses.

Locate the newly cloned
lease(s).

Select the checkbox and
click **Confirm Lease
OpEx** to finalize the
OpEx period.

The screenshot shows the 'Operating Expenses' section of the Stratafolio application. The interface includes a sidebar with navigation options like Dashboards, Hierarchy, Properties, Operations, and Finances. The main content area displays a table of lease data with columns for Confirmed status, Entity Legal Name, Buildings Address, Unit #, Tenants, Use ACH, Lease Type, Lease Status, Lease Start Date, Lease End Date, OpEx Start Date, and OpEx End Date. A red box highlights the 'Confirm Lease OpEx' button in the top action bar. The table shows several rows of data, including entries for Lionfish Properties, LLC, Bird Real Estate, LLC, and Parker, LLC. The status 'Confirmed' is visible in green boxes next to some rows.

Confirmed	Entity Legal Name	Buildings Address	Unit #	Tenants	Use ACH	Lease Type	Lease Status	Lease Start Date	Lease End Date	OpEx Start Date	OpEx End Date
<input type="checkbox"/>	Lionfish Properties, LLC	4500 Lionfish Lane, Iowa City, IA 52240	102	Fleming Lawncare	No	NNN	Occupied	08/01/2015	11/30/2026	01/01/2025	12/31/2025
<input type="checkbox"/>	Bird Real Estate, LLC	200 Cardinal Road, Cedar Rapids, IA 52402	200	Tire Store	Yes	NNN	Occupied	04/01/2019	03/31/2029	01/01/2025	12/31/2025
<input type="checkbox"/>	Parker, LLC	3519 Partridge Parkway, Cedar Rapids, IA 52404	1A	Vince's Law Firm	No	NNN	Occupied	03/01/2019	02/28/2028	01/01/2025	12/31/2025
<input checked="" type="checkbox"/>	Bird Real Estate, LLC	100 Cardinal Road, Cedar Rapids, IA 52402	100	Pharmacy Store	No	NNN	Occupied	04/01/2019	12/31/2026	01/01/2025	12/31/2025
<input type="checkbox"/>	Lionfish Properties, LLC	4500 Lionfish Lane, Iowa City, IA 52240	101	Acme Parts	No	NNN	Occupied	07/01/2015	06/30/2026	01/01/2025	12/31/2025
<input type="checkbox"/>	Bird Real Estate, LLC	100 Cardinal Road, Cedar Rapids, IA 52402	102	ABC Law Firm	No	NNN	Occupied	05/01/2020	04/30/2030	01/01/2025	12/31/2025
<input type="checkbox"/>	Lionfish Properties, LLC	4500 Lionfish Lane, Iowa City, IA 52240	103	HVAC Central	No	NNN	Occupied	10/01/2015	09/30/2026	01/01/2025	12/31/2025
<input type="checkbox"/>	Bird Real Estate, LLC	5200 Bluebird Road, Cedar Rapids, IA 52403	100	Family Dentist	No	NNN	Occupied	07/01/2018	08/31/2030	01/01/2025	12/31/2025
<input type="checkbox"/>	Bird Real Estate, LLC	5200 Bluebird Road, Cedar Rapids, IA 52403	202	Chicken Restaurant	No	NNN	Occupied	01/01/2024	12/31/2028	01/01/2025	12/31/2025

Showing 1 to 9 of 9 entries 1 rows selected

Checklist

Before Cloning

- ☐ Existing OpEx period is accurate
- ☐ All subcategories are entered
- ☐ Lease terms are correct
- ☐ Budgets for the new year are prepared if possible

After Cloning

- ☐ New OpEx period appears in the lease
- ☐ Dates are accurate
- ☐ Lease term extended if needed
- ☐ All subcategories cloned properly
- ☐ New OpEx amounts updated per the budget if not done during the cloning process
- ☐ New year's invoices scheduled as expected

Additional Steps

- ☐ Tenants need to be alerted about their increase for the following period

Best Practices

- **Confirm the Current OpEx Period Is Accurate Before Cloning**
 - The current OpEx period dates are accurate
 - Expected categories (CAM, taxes, insurance, etc.) are included
 - All subcategories have been added and correctly assigned
 - The tenant's invoices for that period have been generated and collected
 - Any special rules (admin fees, exclusions, allocations, etc.) are reflected accurately
- **Use Filters to Control What You Clone**
 - Use the new drop down feature to select the missing next OpEx period to see which leases need the OpEx cloned
 - Filter by OpEx Date to select only the period you want to clone
 - Use Organization, Entity, or Asset filters for bulk cloning
 - Validate the list before selecting "Clone Selected OpEx"
- **Resolve Errors Immediately**
 - Download the error report
 - Review the explanation for each flagged lease
 - Correct the issue in the lease or OpEx tab
 - Attempt the cloning operation again
- **Keep an Annual Cloning Routine**
 - Clone OpEx periods in bulk once per year before invoicing for the new period
 - Make any annual rate increases immediately after cloning or during the cloning process
 - Ensure newly cloned periods align with each lease's term end

Best Practices (*continued*)

- ***Maintain Clean Records for Future Reconciliations***
 - To avoid issues later:
 - Keep subcategories consistent across years and integrations when possible
 - Avoid removing subcategories unless absolutely necessary
 - Confirm invoice generation for each new period
 - Audit cloned amounts before year-end reconciliation season