# Cleaning Up Your Other Names List

Your Other Names List should include only names that do not belong to Customers, Vendors or Employee Lists.  Customers, Vendors and Employees have centers that are most helpful in tracking down transaction history by each name.  Names in these three centers are also used to create “forms” such as invoices, bills, or pay checks, and to record payments.  The Other Names List does not have a “center” for researching history, or the capacity to create forms or apply payments, and therefore, should be used sparingly.

Here are some tips to clean up your Other Names List:

1. Use the Other Name type for things such as NSF or other bank fees, or transactions that will not be used in creating forms or payment transactions, or that you will not want to see the history of transactions in the future.
2. Tips on the different types (Customer, Vendor, or Employee), and name formatting:

* An independent contractor, that may require a 1099, is a Vendor
* A Customer buys from you, a Vendor sells to you, and an Employee works for you (W-2)
* Names must be slightly different to appear on more than one list (see f. below)
* If you have used a name in a transaction, you cannot delete it. You can, however, make it inactive if it was used in a past period and you suspect you will not use it again.
* Use a consistent format. Last name, first name is the best because QuickBooks tries to automatically find the name while you are typing in the field. If you have 20 people named Mary, but only one named “Example, Mary”, typing the “E” may decrease your input time, as compared to looking through 20 names beginning with Mary. You can open your vendor and customer lists side by side, and sort them by using the resort list option at the bottom of the list window to correct names to your chosen format. You may get a message “That Name is being used. Would you like to merge them?” Be certain you want to merge before answering.
* If the same business is both a customer and a vendor, it should appear on both customer and vendor lists. Use “V”, or “C” after the name to distinguish which list the business belongs to. If you have this situation and have made entries to a single name, run a report and modify the entries that there are the fewest to the new name with either the “V” or “C”, as appropriate.

3. To actually change the type in the Other Names List:

* Go to the Lists menu and click Other Names List (If you have several Other Names to change, click Activities at the bottom of the window, Change Other Name Type. Select the column for the type you want to change the Other Name to (Vendor, Customer, Employee)), or for a single change in type:
* In the Other Names list, double-click the name that you want to change
* In the Edit Name window, click Change Type
* Click the name type you want to use instead

**Make sure of the name type you choose. Changing a name type can't be undone**.