Easy Organizer Suite™
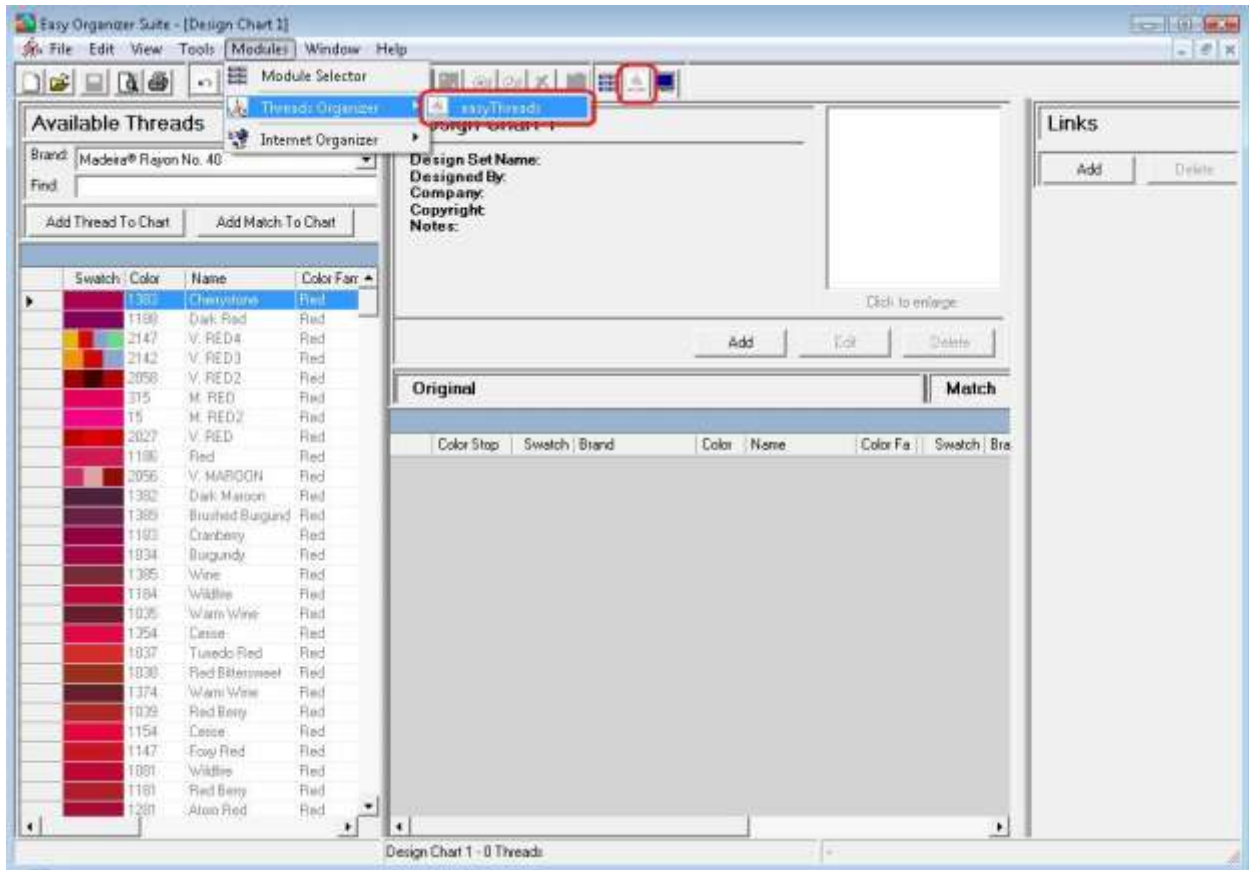**Threads Organizer™ Module Pack**
easythreads™ Module

Lesson 5 - How to Use The Convert Feature

Welcome to the **easythreads™** Lessons series. As you follow through each lesson, you will learn new and exciting aspects of the **easythreads™** Module and by the end of the series you will be an expert! Each lesson will build on the last, so be sure to go through the series in order. Our fifth lesson will show you how to use the Convert feature.
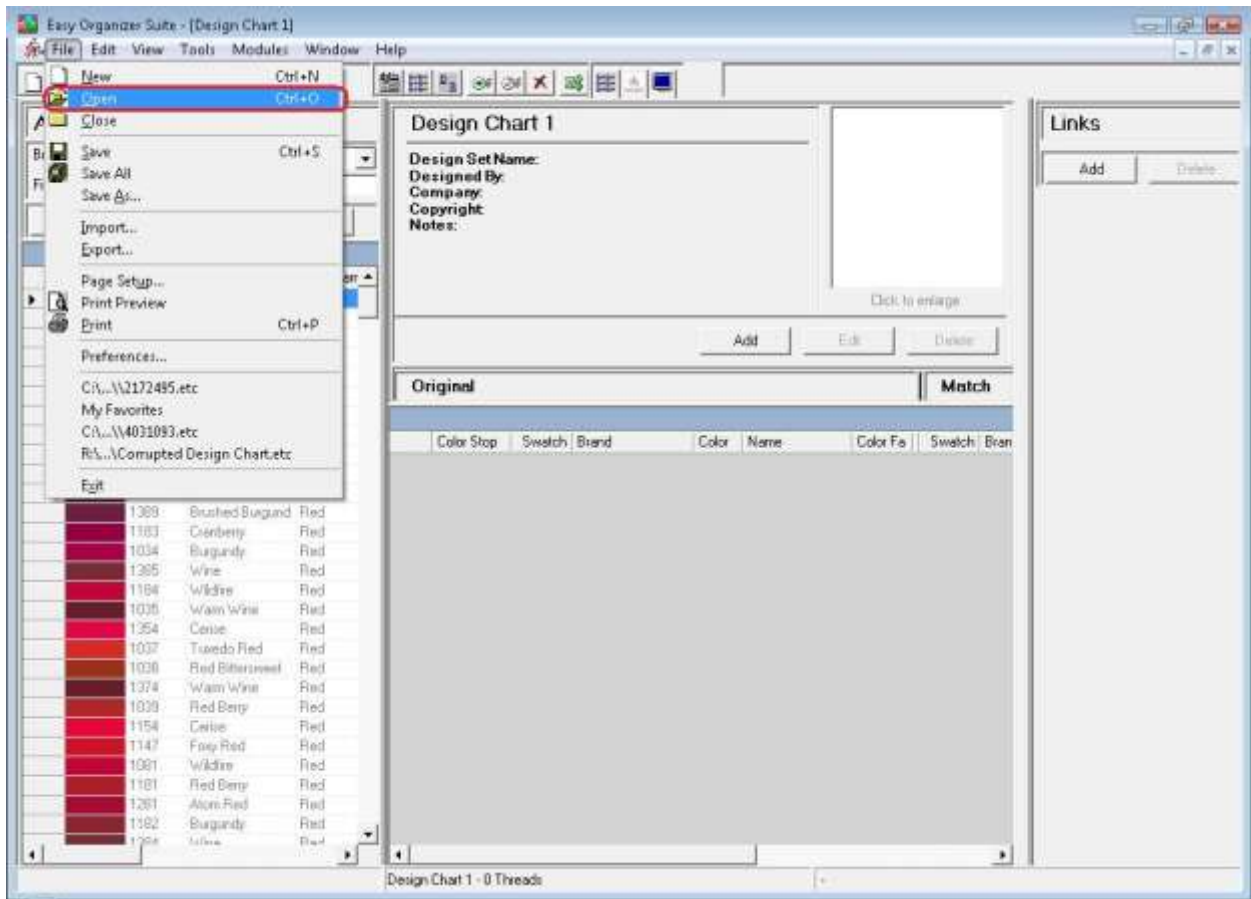
The Convert feature is used in Design Charts and My Favorites Lists as well as from Show Matches. It allows you to set the settings to limit the way it finds matches, and then finds the matches to the threads.
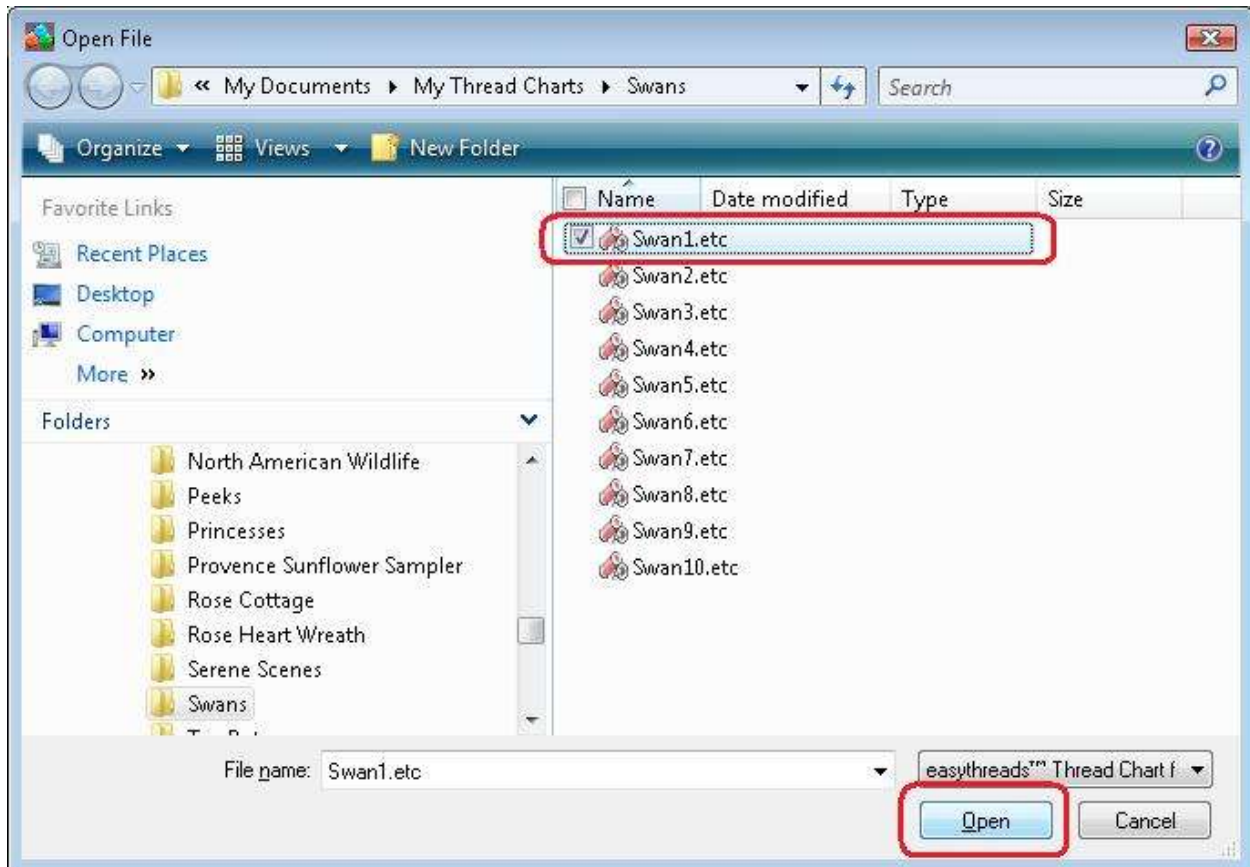
The Settings of the Convert Options Form

1. To begin, open **Easy Organizer Suite™** and select the **easythreads™** Module. If you are not already in the **easythreads™** Module, then select Modules → Threads Organizer → easythreads from the menu, or you can click on the **easythreads™** icon in the toolbar.
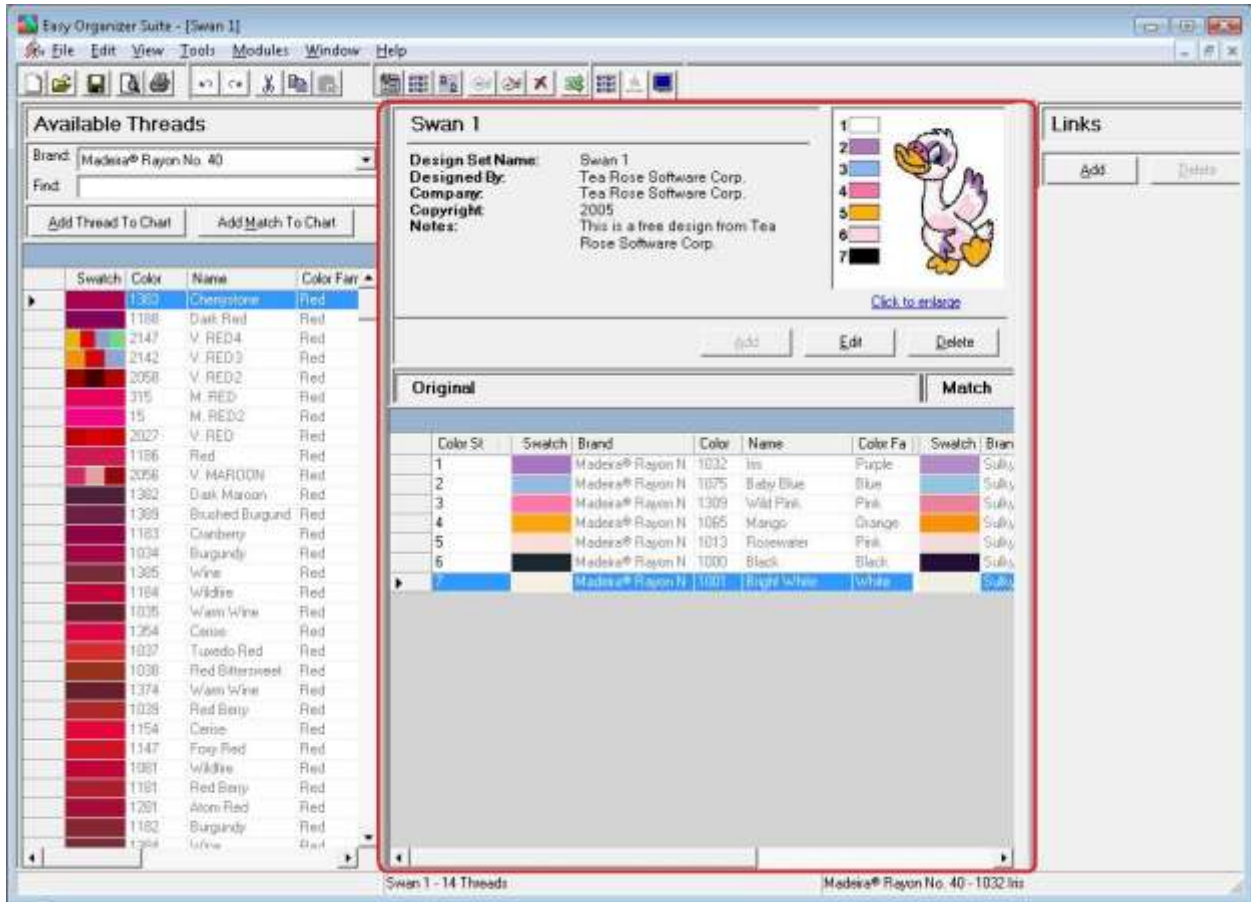
2. You must have either a Design Chart or a My Favorites List open. Let's open an existing Design Chart. Select File → Open or click on the Open icon in the toolbar.
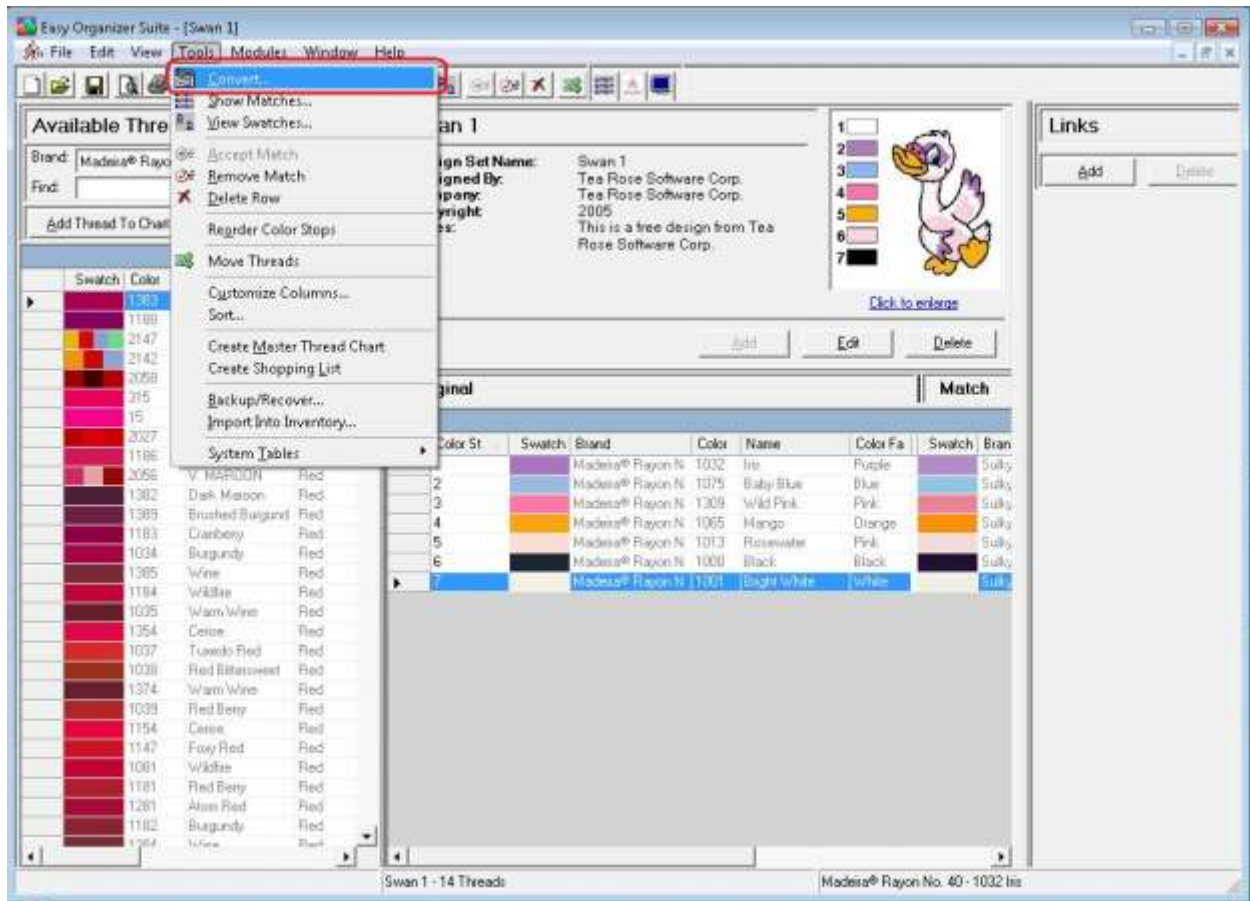
3. The Open File dialog will open. Select the file you would like to open and then click on the Open button.

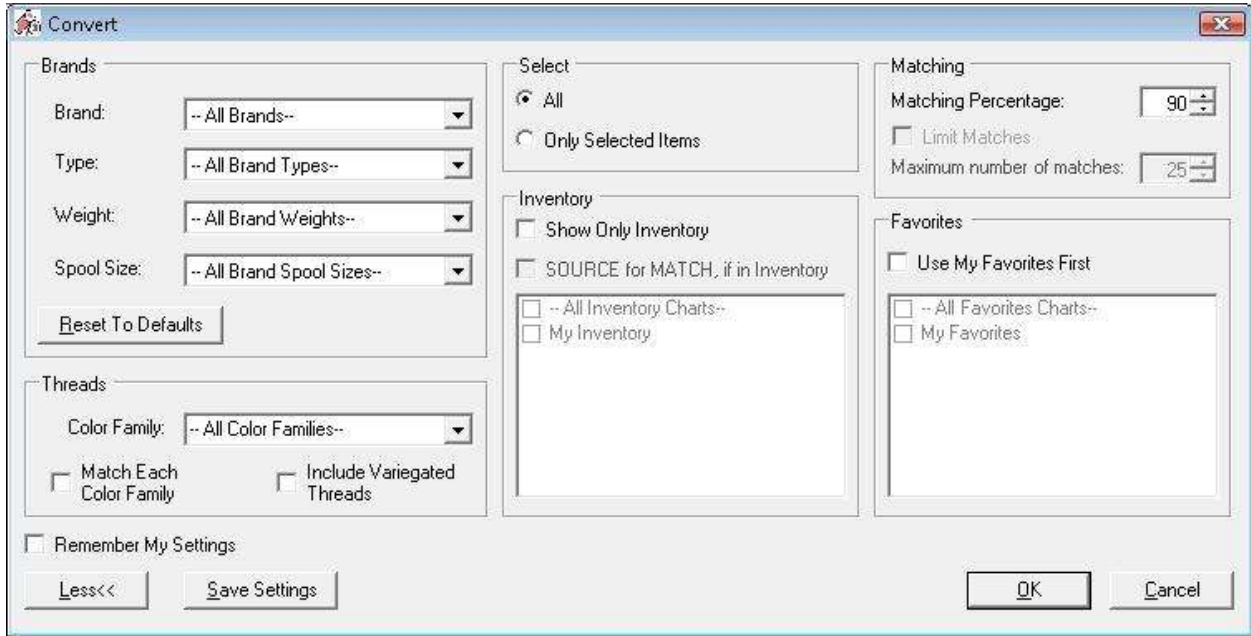4. The existing Design Chart will open.

5. To open the Convert Options form, you can select Tools -- > Convert or click on the Convert icon in the toolbar. You can also right click in the Design Chart grid and select Convert from the Context Menu.
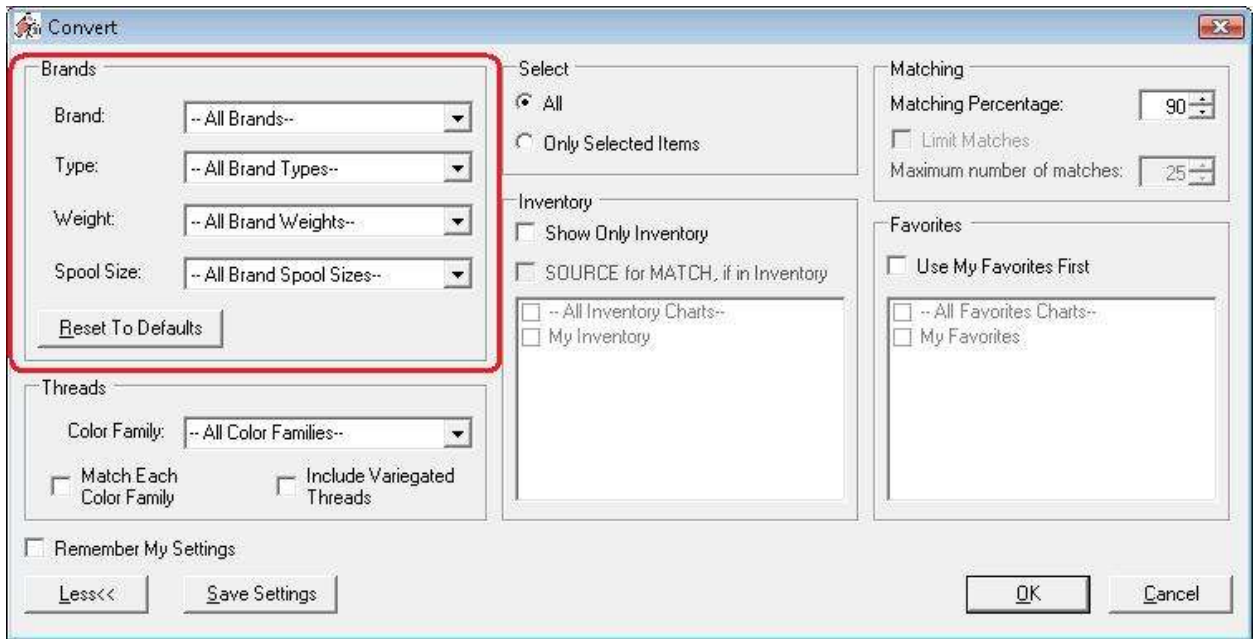
6. The Convert Options form will open.

There are different sections to the Convert Options form.   We'll describe each section.
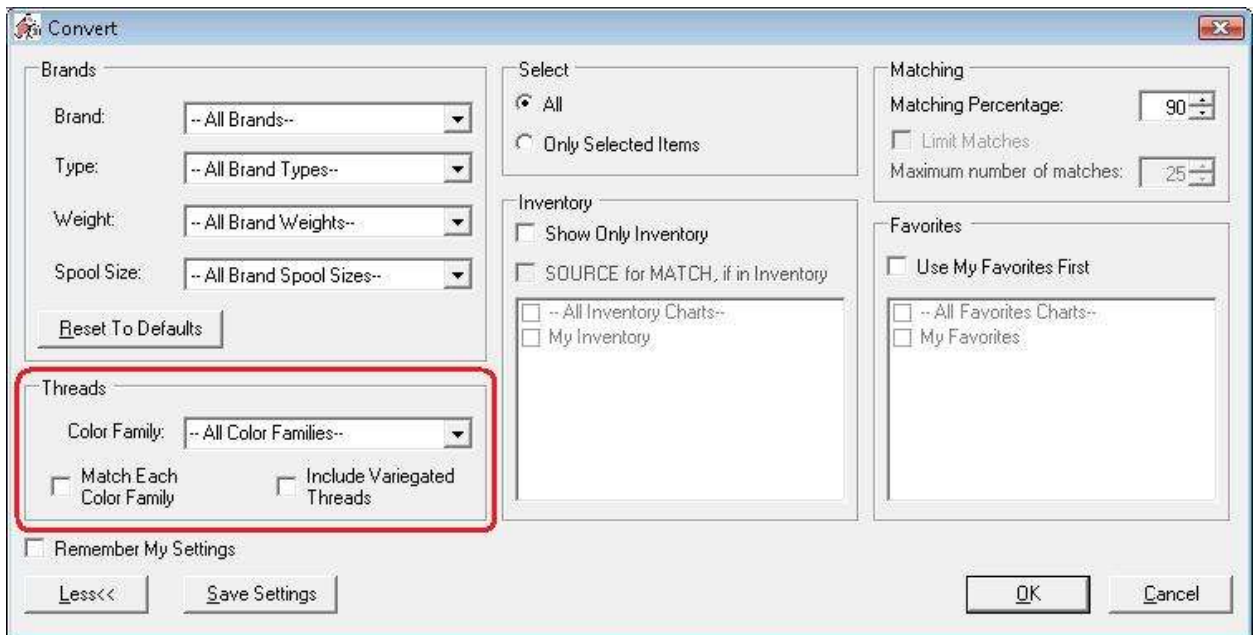
7. The Brands Section allows you to limit the results by the Brands information. This includes the Brand, like Madeira Rayon No. 40, the Type, like Polyester, the Weight, like 30 weight, and the Spool Size, like Mini-King. When the Brands drop down is selected, then the Type, Weight and Spool Size drop downs are disabled because each Brand only has one Type, one Weight, and one Spool Size. When the Brands drop down is set to – All Brands --, or by clicking on the Reset To Defaults button, then you can limit the results by Type, Weight and Spool Size again.
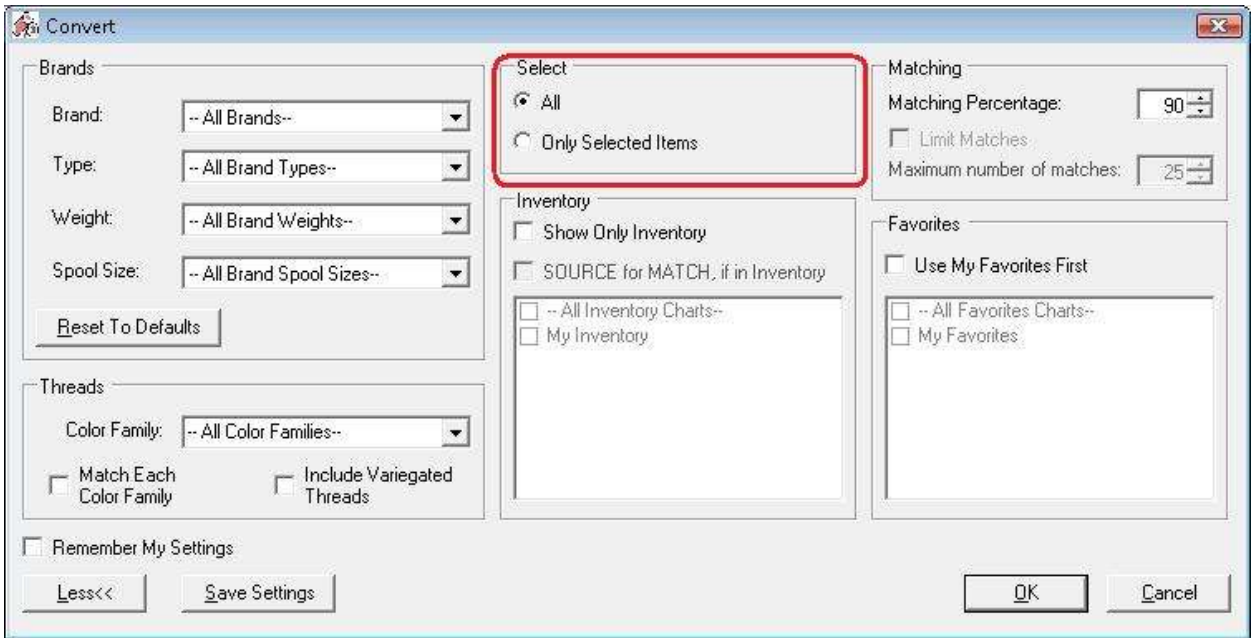
8. The Threads Section contains the Color Family dropdown, which allows you to select a color family to limit the results. This is useful when wanting to find matching threads in an entirely different Color Family, like changing a rose design from pink to yellow.

   Putting a check in the Match Each Color Family checkbox forces the system to find a matching thread that is in the same Color Family for each thread. So, if the first thread is in the green Color Family, then the system will find a matching thread that is also in the green Color Family.

   Checking the Include Variegated Threads checkbox tells the system to also look at variegated threads when finding matching threads.
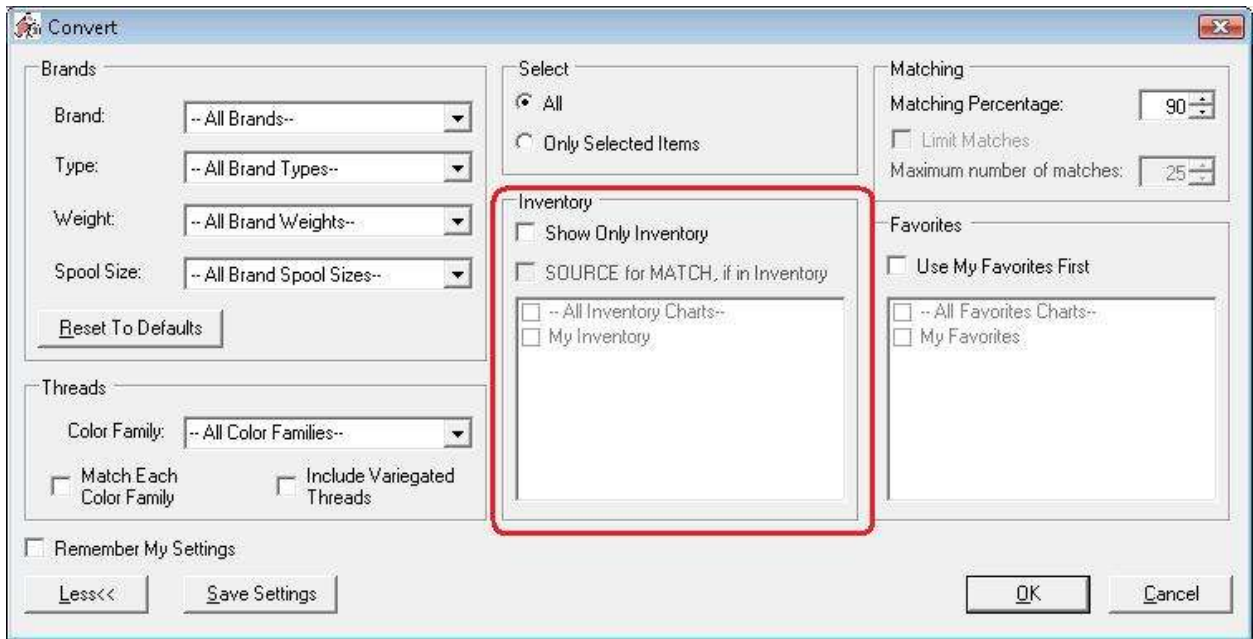
9. The Select Section allows you to either find matches for all the threads in the chart, or only for the selected items.

10. The Inventory Section contains a checkbox called Show Only Inventory, which if checked will find matches that are in the checked My Inventory Lists.

    If the SOURCE for MATCH, if in Inventory checkbox is checked, then if the source or original thread is already in the checked My Inventory Lists, then the system will use that thread as the match.
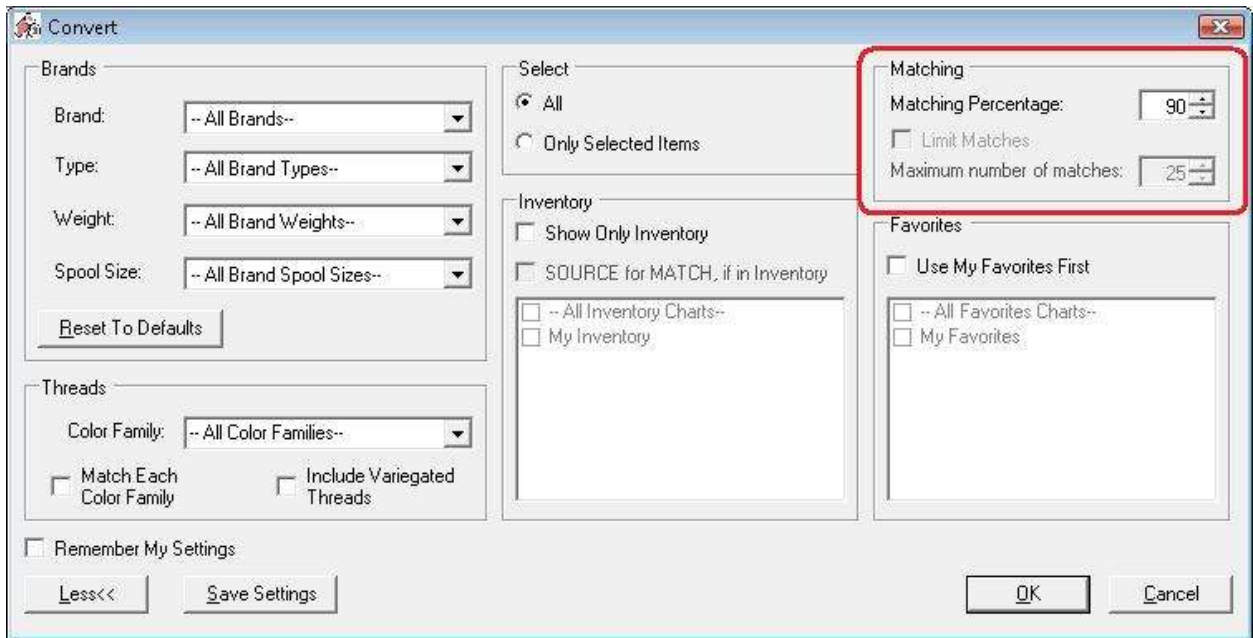
    The My Inventory Lists listbox displays all of the My Inventory Lists that are available. You can either check the – All Inventory Charts – to include all of the My Inventory Lists, or you can check one or more specific My Inventory Lists to only include them when finding matches.

11. In the Matching Section, you can set the Matching Percentage and the Maximum number of matches.
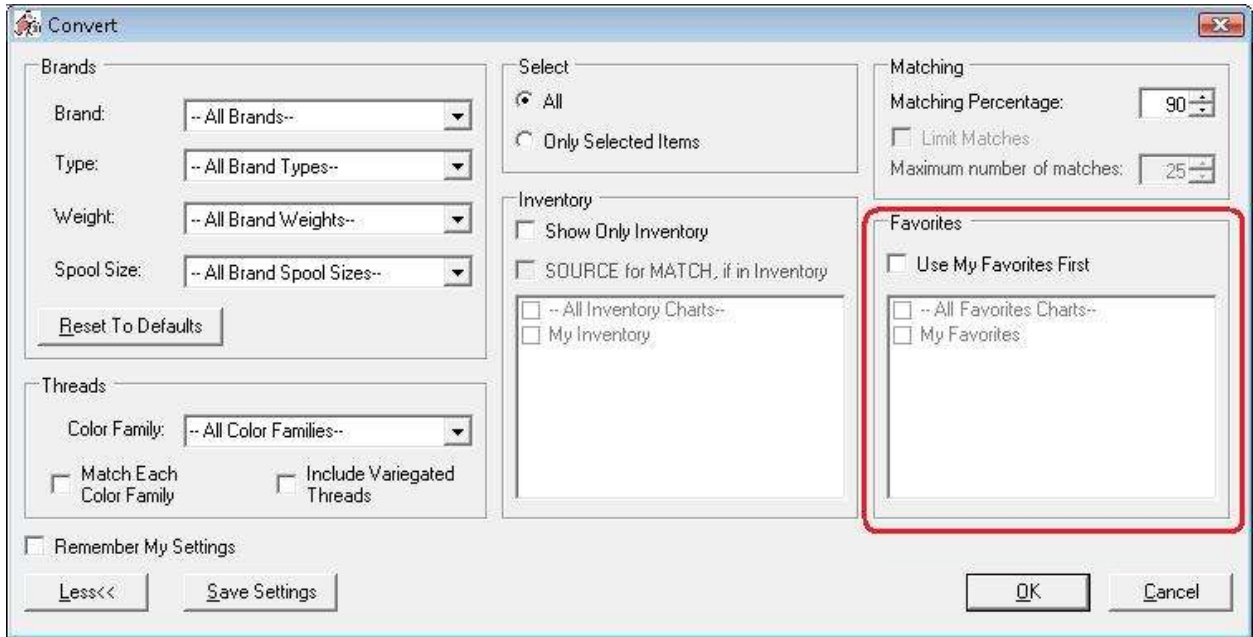
    If you set the Matching Percentage to 90, then the system will find all threads that match at 90% or better.

    The Maximum number of matches is only enabled when opening the Convert Options form from the Show matches Chart. You can designate how many matches to display, for example 25, or you can indicate that the system should find all matching threads by unchecking the Limit Matches checkbox.
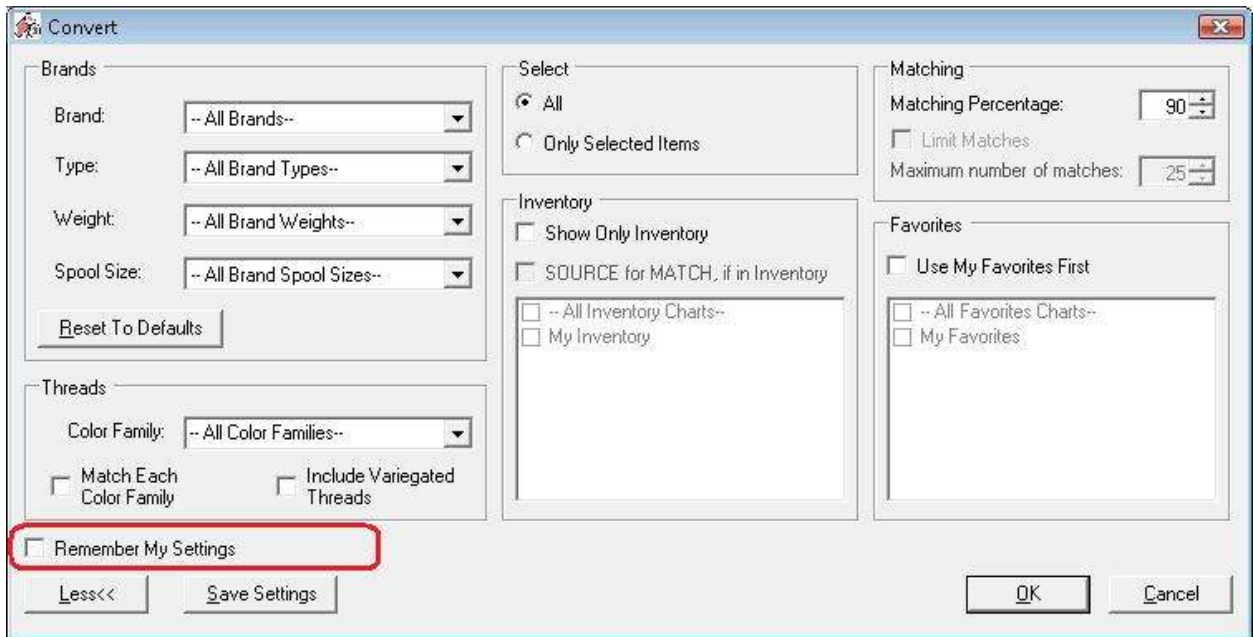
12. The Favorites Section contains a checkbox called Use My Favorites First, which if checked will tell the system to attempt to find matches in any of the checked My Favorites Lists first. If it finds a match, it accepts that match, but if it doesn't find any matching threads, then it finds matches using the included brands.
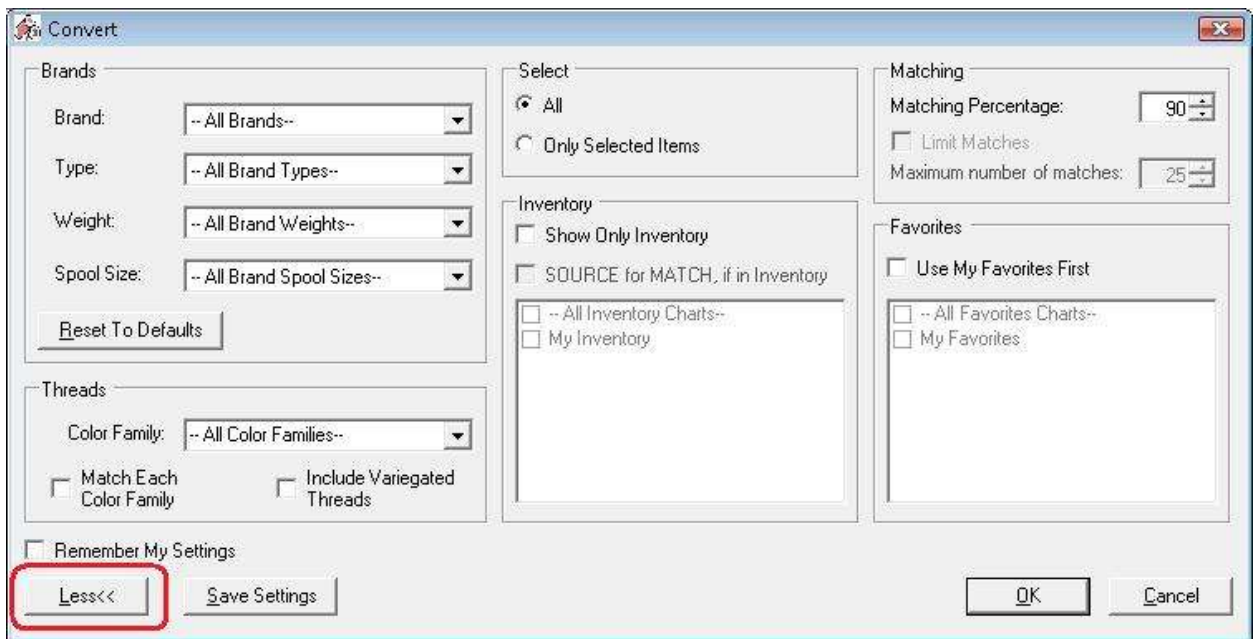
The My Favorites Lists listbox displays all of the My Favorites Lists that are available. You can either check the – All Favorites Charts – to include all of the My Favorites Lists, or you can check one or more specific My Favorites Lists to only include them when finding matches.

13. The Remember My Settings checkbox is used to save your settings in the database. Also when you open the Show Matches form, it uses the current settings saved to choose the matching threads to display if the Remember My Settings checkbox is checked. Also, when importing an embroidery design, which is only available in the Pro Edition, the system uses the saved settings to convert the threads of the incoming embroidery design.
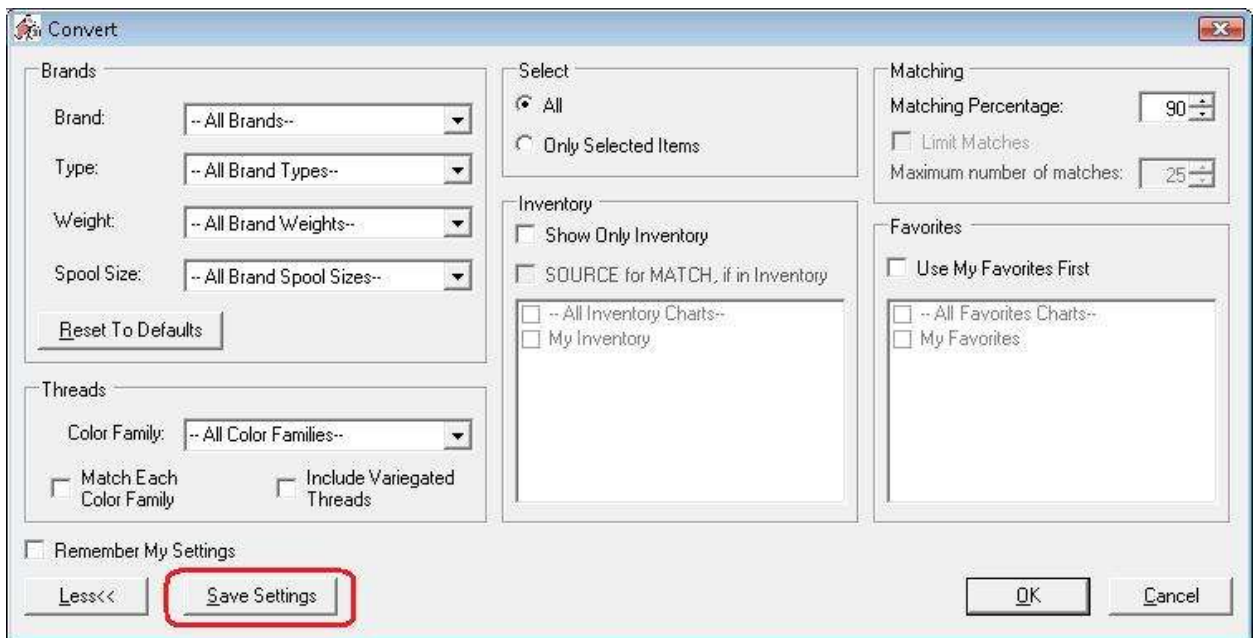

14. The Less and More Buttons are used to collapse and expand the basic settings available.
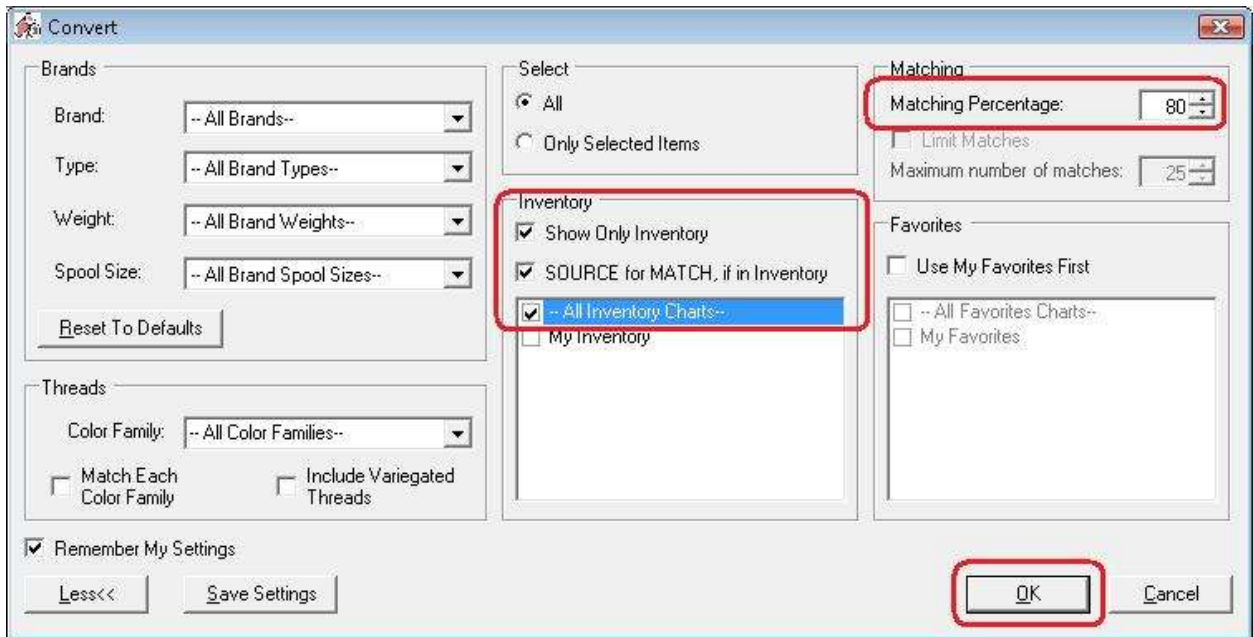
15. If you want to use just the basic filters in the Convert Options form, click on the << Less button. This will show a smaller form with less filters, and can be useful if you don't want to change very many filters. The More >> button will be available to view the expanded Convert Options form.
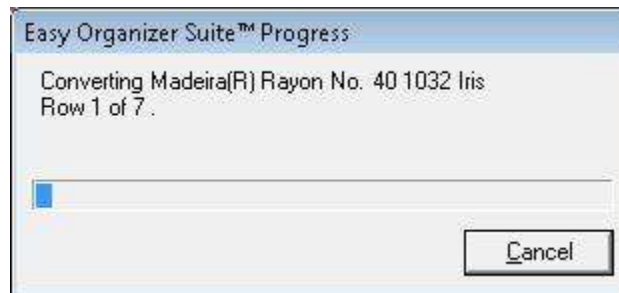
16. The Save Settings button saves the current settings into the easythreads database.
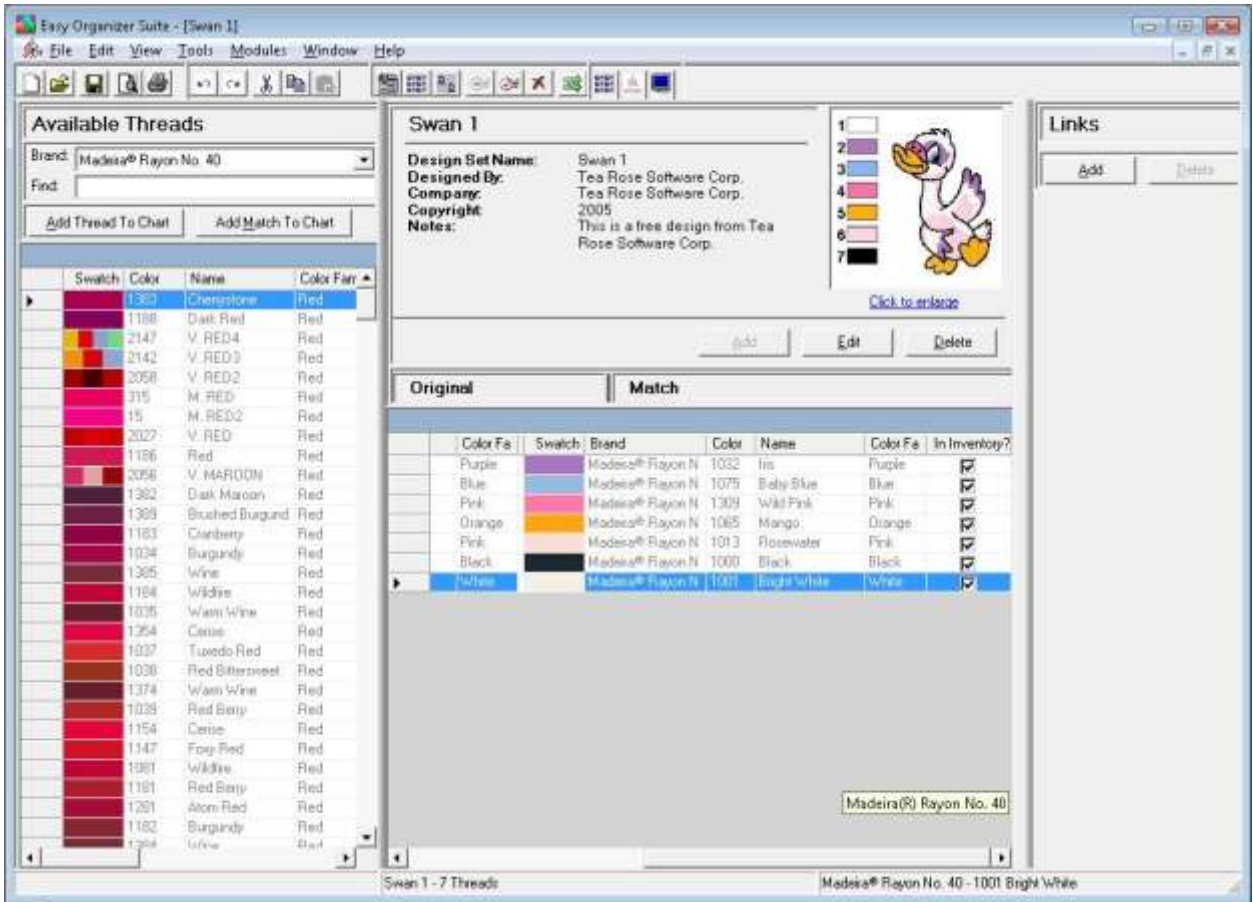
17. To use the Convert Options form to convert the threads in a Design Chart, select the settings that you want to use, and click on the OK button. To set the settings to convert all the threads in a Design Chart to the threads that you have in your Inventory, Click on the Show Only Inventory checkbox, SOURCE for MATCH, if in Inventory checkbox, and ensure that the – All Inventory Charts – checkbox is checked. Set the Matching Percentage to 80%. Now click on the OK button.
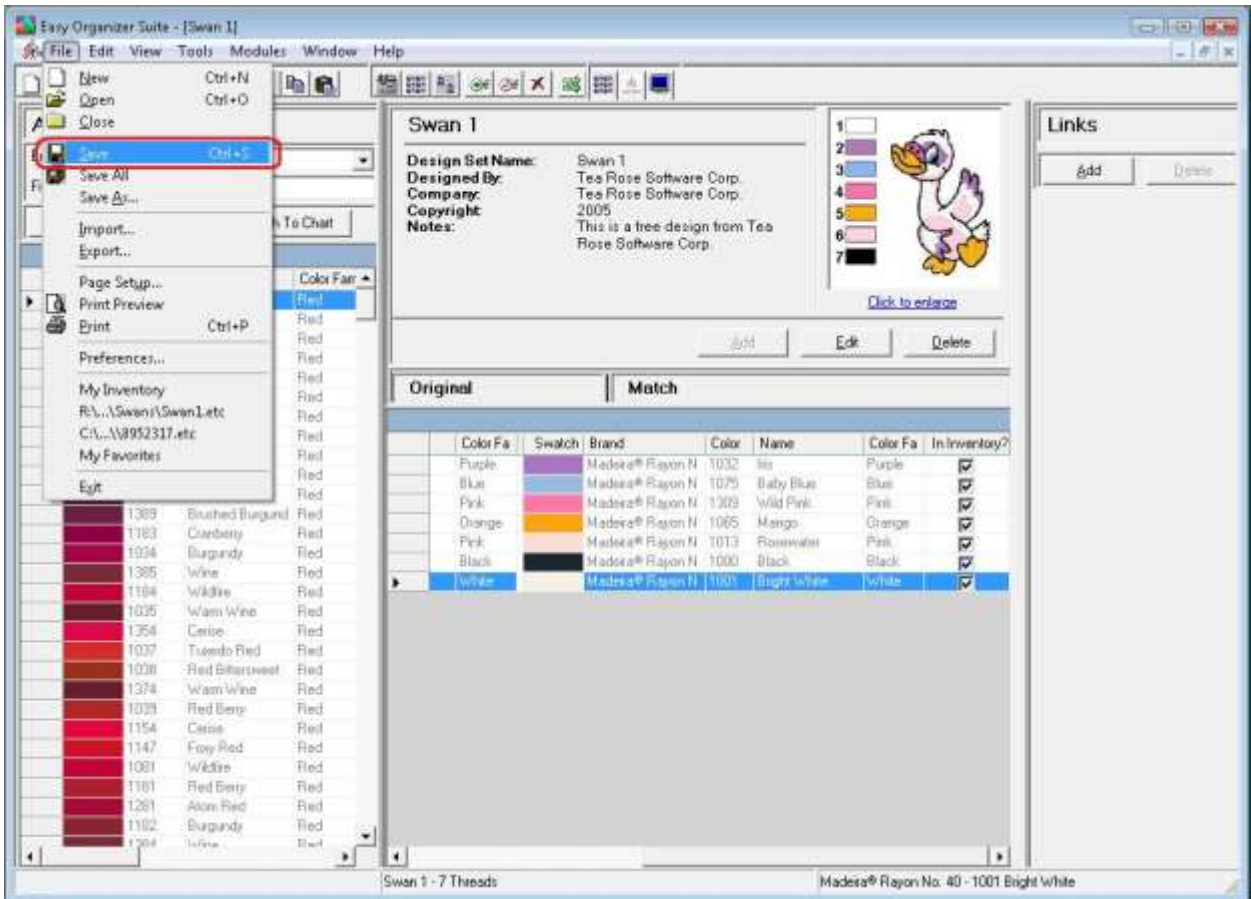

18. The system will begin converting all the threads in your Design Chart.

19. When it has finished, you will see all the threads with their matches.

20. Be sure to save your Design Chart. Select File → Save or click on the Save icon in the toolbar.

Congratulations! You have just converted all the threads in an existing Design Chart!

Congratulations! You have finished Lesson 5. You are now ready to move on to Lesson 6 – How to Use the Show Matches and View Swatches Features.