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

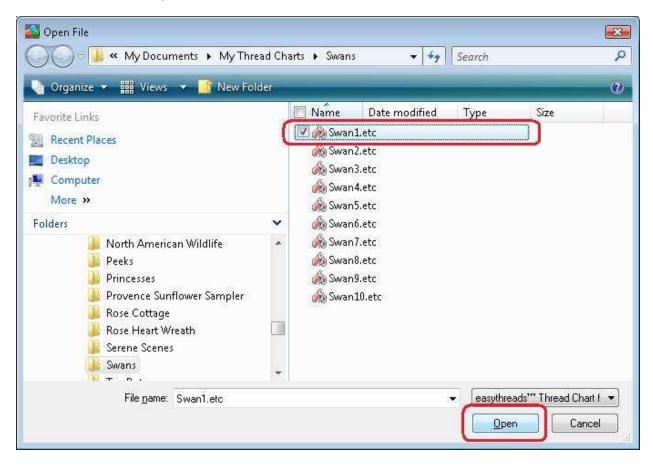
 To begin, open Easy Organizer Suite[™] and select the easythreads[™] Module. If you are not already in the easythreads[™] Module, then select Modules → Threads Organizer → easythreads from the menu, or you can click on the easythreads[™] icon in the toolbar.

Easy Organizer Suite - [Design Chart 1] File Edit View Tools [Modules] Window Design Data (Charter) Module Selector Module Selector		
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 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.

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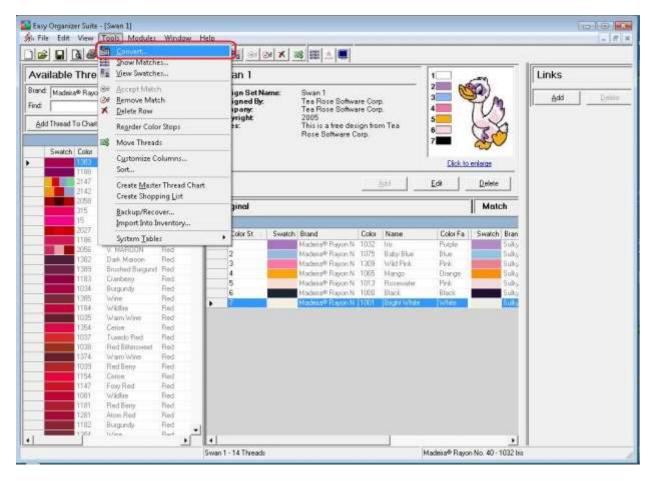
3. The Open File dialog will open. Select the file you would like to open and then click on the Open button.



4. The existing Design Chart will open.

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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.

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Color Family: All Color Families	Color Family: All Color Families		

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.

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Brand: Type:	All Brands	C Only Selected Items	Matching Percentage: 90 Limit Matches Maximum number of matches: 25
Weight: Spool Size: <u>R</u> eset To Def	·	Inventory Show Only Inventory SOURCE for MATCH, if in Inventory All Inventory Charts- My Inventory	Favorites Use My Favorites First G ~ All Favorites Charts~ My Favorites
hreads Color Family: Match Eac Color Famil	h — Include Variegated		

 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.

rands		Select	Matching
Brand: All Bran	ds	- All	Matching Percentage: 90
Type: All Bran	ार्ड्स म	Only Selected Items	Maximum number of matches: 25
Weight: All Bran	d Weights	Inventory	Favorites
Spool Size: All Bran	d Spool Sizes	SOURCE for MATCH, if in Inventory	🔲 Use My Favorites First
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hreads			
Color Family: All Colo	r Families		
— Match Each Color Family	☐ Include Variegated Threads		
Remember My Settings		_	
Less<< Save S	ettings		<u> </u>

9. The Select Section allows you to either find matches for all the threads in the chart, or only for the selected items.

Brands		Select	Matching
Brand:	All Brands	All Only Selected Items	Matching Percentage: 90 🛨
Туре:	All Brand Types		Maximum number of matches: 25
Weight:	- All Brand Weights-	Inventory Show Only Inventory	Favorites
Spool Size:	All Brand Spool Sizes	SOURCE for MATCH, if in Inventory	🗖 Use My Favorites First
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Color Family:	All Color Families	-	
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Less<<	Save Settings		<u> </u>

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.

Brands		Select	Matching
Brand:	All Brands	All Only Selected Items	Matching Percentage: 90 - 90 - 90 - 90 - 90 - 90 - 90 - 90
Туре:	All Brand Types		Maximum number of matches: 25
Weight:	All Brand Weights	Inventory Show Only Inventory	-Favorites
Spool Size:	All Brand Spool Sizes	SOURCE for MATCH, if in Inventory	🔲 Use My Favorites First
<u>R</u> eset To Defa	aults	All Inventory Charts My Inventory	All Favorites Charts My Favorites
Threads			
Color Family:	All Color Families		
□ Match Each Color Family			
Remember My	Settings	<u> </u>)
Less<<	Save Settings		<u> </u>

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.

Brands		Select	Matching
Brand: All Br	ands	All Only Selected Items	Matching Percentage: 90 🛨
Type: All Br	and Types	•	Maximum number of matches:
Weight: All Br	and Weights	Inventory Show Only Inventory	Favorites
Spool Size: All Br	and Spool Sizes	SOURCE for MATCH, if in Inventory	Use My Favorites First
Reset To Defaults		All Inventory Charts My Inventory	
[hreads			
Color Family: All Co	lor Families	•	
☐ Match Each Color Family	☐ Include Variegate Threads		
Remember My Settings			

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.

Brands		Select	Matching
Brand:	All Brands		Matching Percentage: 90 🛨
Туре:	All Brand Types	Only Selected Items	Maximum number of matches:
Weight:	- All Brand Weights	Inventory Show Only Inventory	Favorites
Spool Size:	All Brand Spool Sizes	SOURCE for MATCH, if in Inventory	🗖 Use My Favorites First
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Remember My	y Settings		<u> </u>
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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.

Brand: - All Brands Type: - All Brand Types Weight: - All Brand Weights Spool Size: - All Brand Spool Sizes Beset To Defaults - All Inventory Threads - All Color Families Match Each Include Variegated Color Family - Include Variegated	Brands	Select	Matching
Type: - All Brand Types Maximum number of matches: Weight: - All Brand Weights Inventory Spool Size: - All Brand Spool Sizes SOURCE for MATCH, if in Inventory Beset To Defaults - All Inventory - All Inventory Threads - All Color Families My Inventory Match Each - Include Variegated - Include Variegated	Brand: All Brands		1
Weight: All Brand Weights Spool Size: All Brand Spool Sizes Beset To Defaults Color Family: All Color Families Match Each Match Each Show Only Inventory <td>Type: All Brand Types</td> <td></td> <td></td>	Type: All Brand Types		
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14. The Less and More Buttons are used to collapse and expand the basic settings available.

Brands		Select	Matching
Brand:	All Brands		Matching Percentage: 90
Туре:	All Brand Types	Only Selected Items	Limit Matches Maximum number of matches: 25
Weight:	- All Brand Weights-	Inventory Show Only Inventory	Favorites
Spool Size:	All Brand Spool Sizes	SOURCE for MATCH, if in Inventory	🔲 Use My Favorites First
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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.

Select	Inventory
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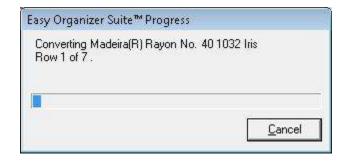
16. The Save Settings button saves the current settings into the easythreads database.

Brands		Select	Matching
Brand:	All Brands	- I I · AI	Matching Percentage: 90
Туре:	- All Brand Types	Only Selected Items	Limit Matches Maximum number of matches: 25
Weight:	All Brand Weights	─ Inventory ─	Favorites
Spool Size:	All Brand Spool Sizes	SOURCE for MATCH, if in Inventory	🗖 Use My Favorites First
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Less<<	Save Settings		<u> </u>

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.

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Spool Size:	Il Brand Spool Sizes	SOURCE for MATCH, if in Inventory	🔲 Use My Favorites First
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Threads Color Family: A IT Match Each Color Family	Il Color Families		
Remember My Settir	ngs Save Settings		

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.

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		1154	Cerise	Red										
		1147	Fog Red	Fled										
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20. Be sure to save your Design Chart. Select File \rightarrow Save or click on the Save icon in the toolbar.

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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.