



BEYOND

RichText

User Guide



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Preface

This documentation contains information on how to install and operate **Beyond RichText** in your Business Central environment.

This documentation is intended for experienced users of Business Central. Additional knowledge of third-party software products may be required to set up **Beyond RichText**.

Read this documentation in full to set up **Beyond RichText** and work with it professionally. Pay particular attention to the tips, information and safety instructions contained in the documentation. Inform your employees about the proper use of **Beyond RichText** and keep the documentation in a place that is accessible to your employees.

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Manufacturer

Beyond RichText is developed by:

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VISIT
APPSOURCE

Version history

Version	Date	Author	Comment
1.0	20.11.2023	Jannic Weidel	Initial Version of the Documentation
1.1	20.05.2025	Jannic Weidel	Added new contents and reworked documentation
1.2	05.06.2025	Jannic Weidel	Added documentation for adding RichTexts to items, resources and service items
1.3	12.06.2025	Jannic Weidel	Added Preface Chapter
Access		public	

General Information

This documentation contains important information that you must observe when following the descriptions. The information is highlighted as notes and arranged according to type and importance. The notes are listed below in ascending order of importance:

TIP

This represents **no risk**. In addition to the classic clicking on options, Business Central also offers the option of using so-called shortcuts. Shortcuts are key combinations with which you can also execute the desired action in the user interface. By using shortcuts, you can work faster and more effectively. Try the key combination and you will be surprised how much faster you can work.

NOTE

This represents **no risk**. This note contains important information on the correct use, configuration or operation of the software. Follow these instructions to avoid inefficiencies and unnecessary support tickets. For example, this note can show you that an option is hidden and tells you how to proceed if you want to show it again.

IMPORTANT

This represents a **low risk**. This notice refers to non-critical issues that may lead to undesired behavior or configuration problems. May affect user experience or functionality if not considered.

CAUTION

This represents a **medium risk**. This notice indicates a potential problem that could affect system stability or data integrity. Failure to comply may result in errors, loss of performance or partial service interruptions. The errors caused by non-compliance only affect the app itself and prevent you from working with data within the app.

WARNING

This represents a **high risk**. This notice indicates an immediate and serious risk to the productive system. Failure to observe this warning may affect the entire system. There is a risk of loss of critical data or total system failure, leading to prolonged downtime. It may not be possible to restore the data and a backup must be imported.

The **Beyond RichText** application enables you to store text with numerous formatting options on documents or document lines. The supported documents are:

Purchase	Sales	Service	Warehouse
Blanket Purchase Order	Blanket Sales Order	Service Contract	Umlagerungen
Purchase Credit Memo	Sales Credit Memo	Service Credit Memo	
Purchase Invoice	Sales Invoice	Service Invoice	
Purchase Order	Sales Order	Service Order	
Purchase Quote	Sales Quote	Service Quote	
Purchase Return Order	Sales Return Order	Service Item Worksheet	

You can also store texts for items, resources and service items.

The latest version of this documentation can be found at the following link: [Beyond RichText Documentation](#).

The examples described in this documentation represent only some of the possibilities offered by the **Beyond RichText** solution. If you have a specific case that you would like to map using the solution, please do not hesitate to contact us.

NOTE

Dependencies on or to other apps

Additional, basic applications are required to use **Beyond RichText**. The following applications are required to use **Beyond RichText**:

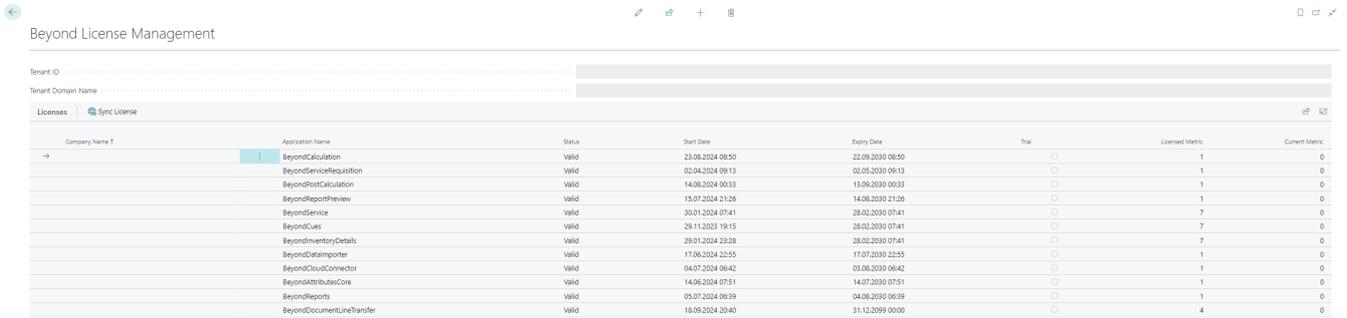
- [Beyond License](#): Management of trial and full licenses for apps of BeyondIT.
- [Beyond RichTextEditor](#): This app implements the basic functions for using rich texts (such as the text field for entering the rich text).

License Management

This chapter describes how you can view the license management of **Beyond RichText**.

To view the status of the product license for **Beyond RichText**, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Beyond License Management**.
2. The **Beyond License Management** page is displayed.



The screenshot shows the 'Beyond License Management' page. At the top, there are fields for 'Tenant ID' and 'Tenant Domain Name'. Below these, there are tabs for 'Licenses' and 'Sync License'. The main content is a table with the following columns: Company Name, Application Name, Status, Start Date, Expiry Date, Trial, Licensed Metric, and Current Metric. The table lists 14 different applications with their respective license details.

Company Name	Application Name	Status	Start Date	Expiry Date	Trial	Licensed Metric	Current Metric
Company 1	BeyondCalculation	Valid	23.08.2024 08:50	22.09.2030 08:50	<input type="checkbox"/>	1	0
	BeyondServiceRequestor	Valid	02.04.2024 09:13	02.05.2030 09:13	<input type="checkbox"/>	1	0
	BeyondCalculation	Valid	14.06.2024 09:33	13.06.2030 09:33	<input type="checkbox"/>	1	0
	BeyondReportPreview	Valid	15.07.2024 21:26	14.06.2030 21:26	<input type="checkbox"/>	1	0
	BeyondService	Valid	30.01.2023 07:41	28.02.2030 07:41	<input type="checkbox"/>	7	0
	BeyondCues	Valid	29.11.2023 19:15	28.02.2030 07:41	<input type="checkbox"/>	7	0
	BeyondInventoryDetails	Valid	29.01.2024 23:28	28.02.2030 07:41	<input type="checkbox"/>	7	0
	BeyondDataImporter	Valid	17.06.2024 22:55	17.07.2030 22:55	<input type="checkbox"/>	1	0
	BeyondCloudConnector	Valid	04.07.2024 06:42	03.08.2030 06:42	<input type="checkbox"/>	1	0
	BeyondAttributeCare	Valid	14.06.2024 07:51	14.07.2030 07:51	<input type="checkbox"/>	1	0
	BeyondReports	Valid	05.07.2024 08:39	04.06.2030 08:39	<input type="checkbox"/>	1	0
	BeyondDocumentLineTransfer	Valid	18.09.2024 20:40	31.12.2030 00:00	<input type="checkbox"/>	4	0

3. Under the **Licenses** section, you will find all product licenses for BeyondIT applications that have been installed for this company. You can read all the necessary information from the values in the columns:

Column	Description
Company Name	This column indicates the name of the company.
Application Name	This column indicates the name of the application. If you use several BeyondIT products, a separate line is displayed for each product in the overview,
Status	This is the status of the product license. Several values are possible: Valid: The product license is valid and the application can be used without restrictions. Expired: The product license has expired. The application can no longer be used. Trial: The product license is valid and the functionalities of the application can be used for a short period of time (note the value in the expiry date column) with restrictions or without restrictions. Exceeded: The product license has expired. The application can no longer be used.
Start Date	This is the date on which the product license was registered.
Expiry Date	This is the date on which the product license becomes or became invalid. The application can no longer be used.
Trial	This checkbox indicates whether the product license is a trial license. Trial licenses are very limited licenses. You can purchase a full product license after the trial license expires (note the value in the Expiry date column).
Licensed Metric	This column shows how the application was licensed. For example, this can be a tenant license, a license per company or a license per user.
Current Metric	This column shows how many licenses are used in the environment. The difference between the values in the Licensed metric and Current metric columns indicates whether you need to purchase an additional license.

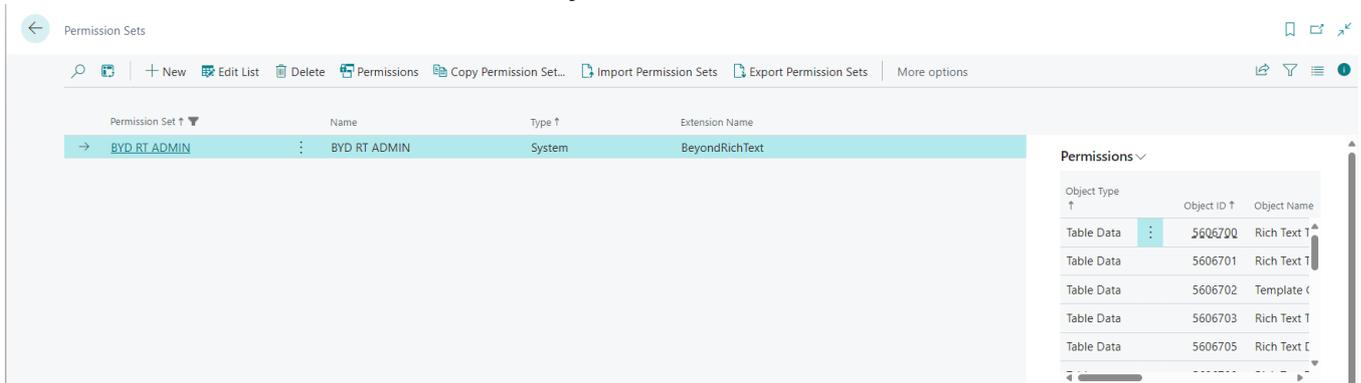
Assign User Permissions

The following description shows how to assign user permissions for the **BEYOND Rich Text** extension. The permission sets provided are:

Permission Set	Description
BYD RT Admin	This permission set enables the use of the Beyond Rich Text extension.

To assign the permission set for **BEYOND Rich Text** to a user, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Permission Sets** and click on the appropriate search result.
3. The **Permission Sets** page is displayed.
4. Select one of the above permission sets from the list.
5. Click **Related > Permissions > Permission Set by User** in the menu bar.



6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondRich Text** as filter criteria.
8. The list is filtered to the permission sets of **BeyondRich Text**.
9. Select the check box on the right side of the page for the user or users to whom you want to assign the permission set.

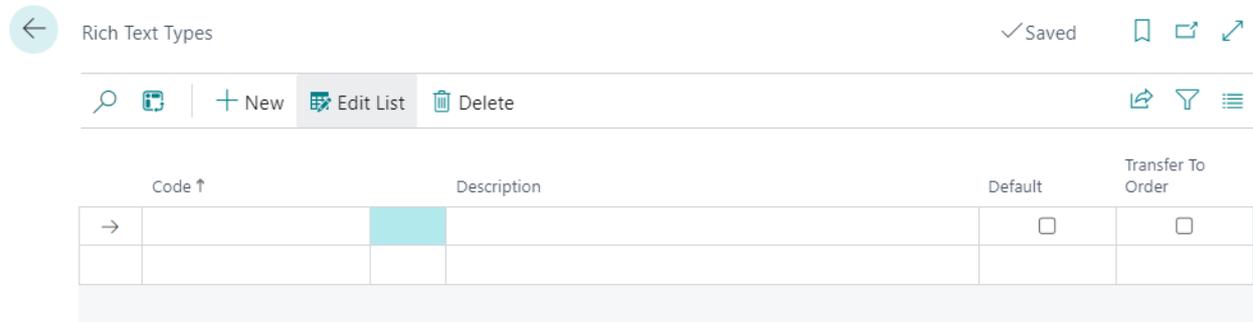
You have assigned a permission set for **BEYOND Rich Text** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

Create Rich Text Type

This chapter describes how to create a rich text type. The rich text types are used when creating a rich text template to make it easier to differentiate between rich text templates.

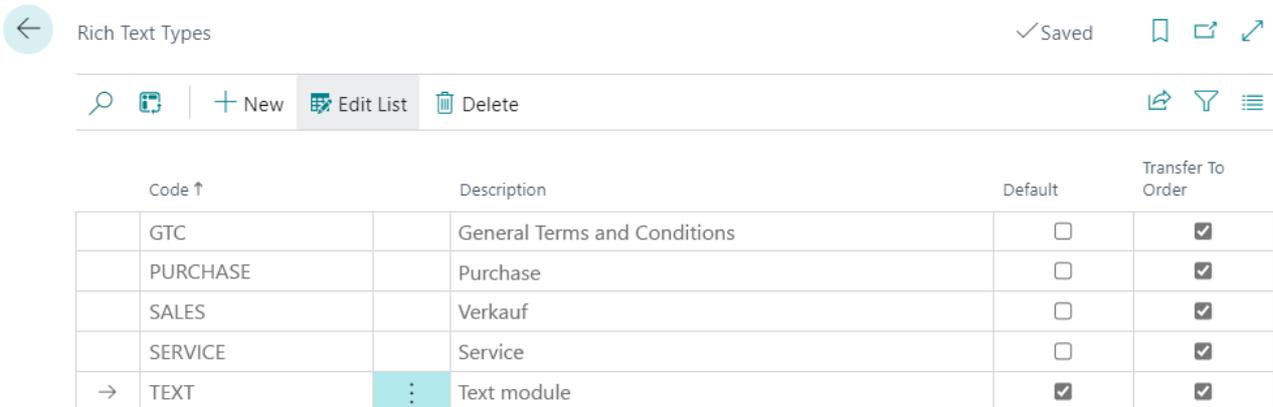
To create a rich text type, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Rich Text Types**.
2. The **Rich Text Types** page is displayed.



The screenshot shows the 'Rich Text Types' page interface. At the top, there is a search bar with a magnifying glass icon, a '+ New' button, and 'Edit List' and 'Delete' buttons. The table below has four columns: 'Code ↑', 'Description', 'Default', and 'Transfer To Order'. The first row is empty, with a right-pointing arrow in the 'Code' column and checkboxes in the 'Default' and 'Transfer To Order' columns.

3. To create a new rich text type, click on the **New** option in the menu bar.
4. Enter a code for the rich text type in the **Code** column.
5. Enter a description for the rich text type in the **Description** column.
6. If you want to set the rich text type as the default rich text type to be used, activate the checkbox under the **Default** column. This rich text type is then assigned to every newly created rich text template.
7. If you want to set the rich text type to be transferred to an order, activate the checkbox under the **Transfer To Order** column.



The screenshot shows the 'Rich Text Types' page with a table containing five rows. The columns are 'Code ↑', 'Description', 'Default', and 'Transfer To Order'. The rows are:

Code ↑	Description	Default	Transfer To Order
GTC	General Terms and Conditions	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PURCHASE	Purchase	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SALES	Verkauf	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SERVICE	Service	<input type="checkbox"/>	<input checked="" type="checkbox"/>
→ TEXT	Text module	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You have created one or more rich text types. When you create a rich text template, you can assign a rich text type to make it easier to distinguish the templates by type.

[Next Chapter](#)

Create Rich Text Template

This chapter describes how to create a rich text template. You can create the text templates for all common documents from the areas of purchase, sales and service. Various formatting options are available for designing the texts.

1. Open the search field (ALT+Q) and search for the **Rich Text Templates** page.
2. The **Rich Text Templates** page is displayed.

The screenshot shows the 'Rich Text Templates' page. At the top, there is a search bar and navigation icons. Below that is a menu bar with '+ New', 'Edit List', and 'Delete' options. The main area contains a table with the following columns: 'Table Id' (with an upward arrow), 'Table Caption', 'Type Code', 'Description', 'Language Code', and 'Start Date'. The first row of the table has a red asterisk in the 'Table Id' column and another red asterisk in the 'Type Code' column. Below the table is a 'Rich Text Editor' with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Text Color (A), and Text Background Color (T). The editor area contains the text 'Start typing...'.

3. To create a new Rich Text template, click on the **New** option in the menu bar.
4. Under the **Table ID** column, select a table from the stored rich text tables. If no table IDs are stored in the rich text table, you must add them manually.
5. The information in the **Table Caption** field is automatically filled by the system if you enter a value in the **Table ID** column.
6. Select a rich text type under the **Type Code** column. You can find further information on the rich text types in the chapter [Create Rich Text Type](#).
7. Enter the language for the rich text in the **Language Code** column.
8. Under the **Start Date** and **End Date** columns, you can define a time period in which the rich text template can be used.
9. If you would like to have the rich text template inserted automatically, for example for documents, activate the **Automatic insert** checkbox.
10. Under the **No. of Conditions** column, you can optionally define conditions for the rich text template. With a condition, it is possible to define a rich text template that is used if the amount in a document is greater than a fixed value (e.g. 1000 \$). In this way, you can create marketing texts for special promotions.

← Conditions ✓ Saved

🔍 + New Edit List Delete

Operator	Field Id	Field Caption	Condition	Type	Constant	Target Field Id	Target Field Caption
→ IF	60	Amount	>	Constant	1000		

11. Under the list of rich text templates, you will find the **Rich Text Editor** pane. Here you can enter and format the text for the rich text template.

← Rich Text Templates ✓ Saved

🔍 + New Edit List Delete

Table Id	Table Caption	Type Code	Description	Language Code	Starting Date	Ending Date	Automatic Insert	No. of Conditions
36	Sales Header	SALES	Sales Greeting	DEU	1/1/1990	1/1/2027	<input checked="" type="checkbox"/>	1

Rich Text Editor

B **I** U ☰ ☷ A ~~T_x~~

|Start typing...

12. The following options are available to you for designing the texts:

- **B** : To format the text **bold**, select the characters and click on this symbol.
- **I** : To format the text **italics**, select the characters and click on this symbol.
- U : To format the text **underlined**, select the characters and click on this symbol.
- ☰ : To format the text as a **list**, select the characters and click on this symbol.
- ☷ : To format the text as a **enumeration**, select the characters and click on this symbol.
- A : To format the text in **color**, select the characters and click on this symbol.
- ~~T_x~~ : To **delete** the **formatting** in a text, select the characters and click on this symbol.

You have created a rich text template. For more information on how to add rich text to documents, see the chapter [Add Rich Text To Documents](#).

Add Rich Text to Document Header

This chapter describes how to add a rich text to a document header. **Beyond RichText** allows you to save rich texts both to the document header and to individual lines within a document.

NOTE

If you use **Beyond RichText** together with **Beyond ReportsV2**, the created rich texts (for the document header and document lines) can also be printed in reports. For more information on how to print rich texts in reports from **Beyond ReportsV2**, please refer to the **Beyond ReportsV2** documentation under the section **Add Rich Text to Report**.

NOTE

You can use texts already created from rich text templates, modify these texts or create new texts. You can find more information about rich text templates in the chapter **Create Rich Text Template**.

To add a rich text to a document header, proceed as follows:

1. Navigate to the document for which you want to add a rich text.
2. Click on the **Rich Text** option in the menu bar of the document header.

Sales Order

S-ORD101001 · Adatum Corporation

Home Prepare Print/Send Request Approval Order Report More options

Post... Release... Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document **Rich Text**

General

Customer Name: Adatum Corporation Posting Date: 2/1/2025 Requested Delivery Date: 3/31/2025

Contact: Robert Townes Order Date: 2/1/2025 External Document No.

Document Date: 2/1/2025 Due Date: 3/1/2025 Status: Open

Lines Manage Line Order

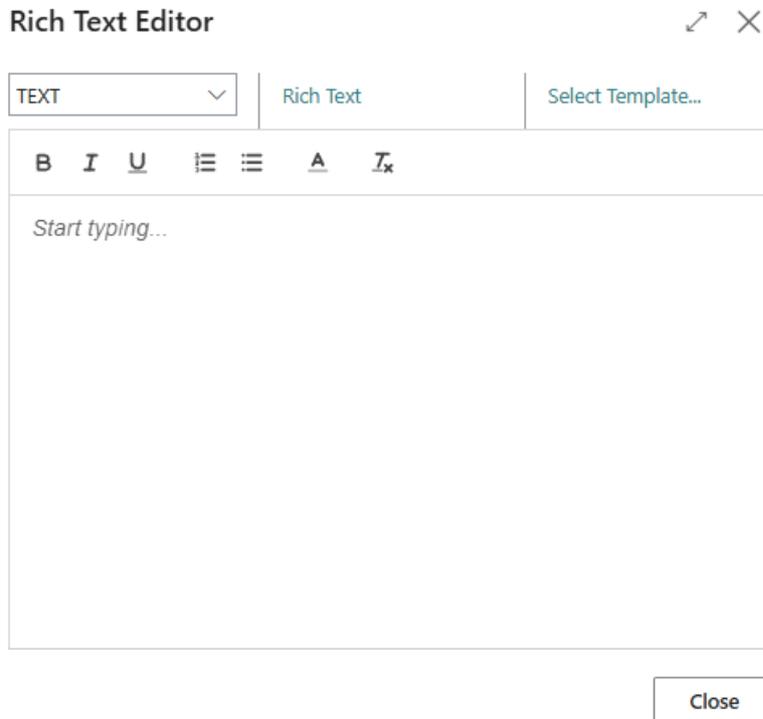
New Line Delete Line Select Items... Rich Text

Rich Text	Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Service Commitments	Customer Contract No.	Vendor Contract No.	An Includ
	Item	1996-5		ATLANTA Whiteboard, base		12			PCS	1,397.50	ATLANTA, GA	FURNITURE		16,767.60	0			17,7

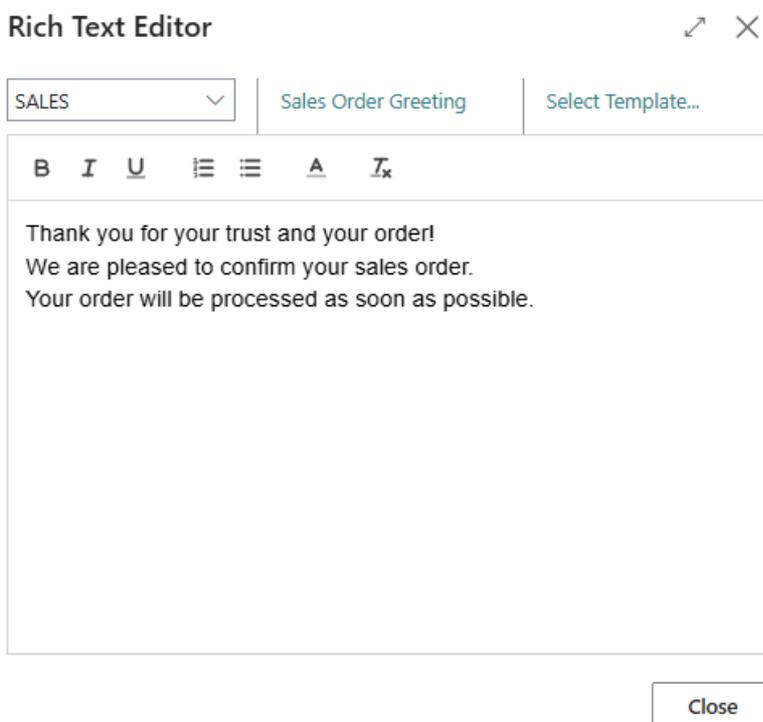
Subtotal Excl. Tax (USD) 16,767.60 Invoice Discount % 0 Total Tax (USD) 1,006.06

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Excl. Tax (USD) 16,767.60 Total Incl. Tax (USD) 17,773.66

3. The **Rich Text Editor** window is displayed.



4. Specify the type of rich text in the dropdown list. The description of the rich text type is displayed to the right of the dropdown list.
5. In the **Rich Text Editor** window, click on the **Select template...** option and select one of the available templates. Alternatively, you can also enter the desired text directly in the window. For more information on how to create a rich text template, please refer to the chapter [Create Rich Text Template](#).



6. The following options are available to you for designing the texts:
 - **B** : To format the text **bold**, select the characters and click on this symbol.
 - **I** : To format the text **italics**, select the characters and click on this symbol.
 - **U** : To format the text **underlined**, select the characters and click on this symbol.
 - **☰** : To format the text as a **list**, select the characters and click on this symbol.
 - **☰** : To format the text as a **enumeration**, select the characters and click on this symbol.

-  : To format the text in **color**, select the characters and click on this symbol.
-  : To **delete** the **formatting** in a text, select the characters and click on this symbol.

You have added a rich text to a document header.

[Create Rich Text Template](#)

Add Rich Text to Document Line

This chapter describes how to add a rich text to a document line. **Beyond RichText** allows you to save rich texts both at the document header and on individual document lines within a document.

NOTE

If you use **Beyond RichText** together with **Beyond ReportsV2**, the created rich texts (for the document header and document lines) can also be printed in reports. For more information on how to print rich texts in reports from **Beyond ReportsV2**, please refer to the **Beyond ReportsV2** documentation under the section **Add Rich Text to Report**.

NOTE

You can use texts already created from rich text templates, modify these texts or create new texts. You can find more information about rich text templates in the chapter **Create Rich Text Template**.

Um einen Rich Text zu einer Belegzeile hinzuzufügen, gehen Sie wie folgt vor:

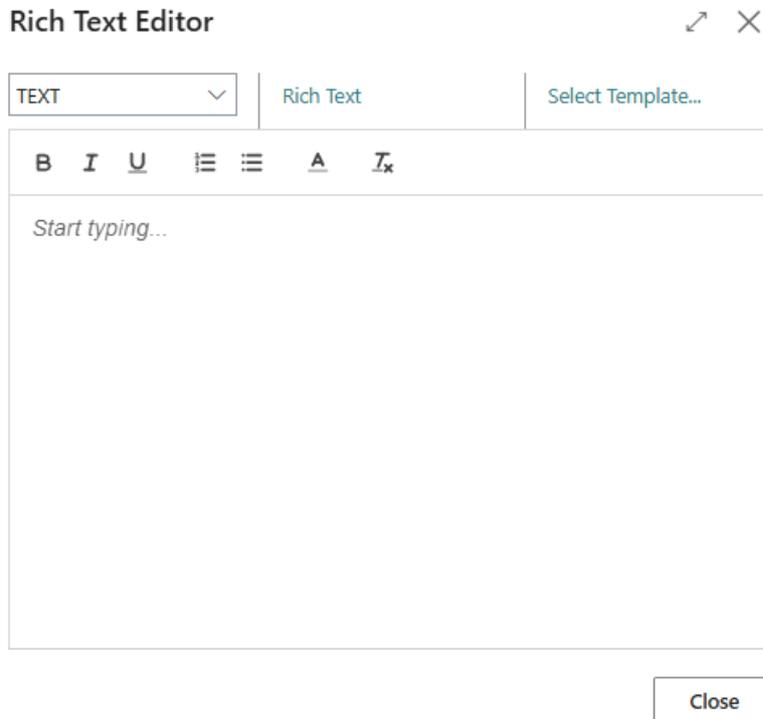
1. Navigate to the document for which you want to add a rich text.
2. In the menu bar of the **Lines** tab, click on the corresponding document line and select the **Rich Text** option in the menu bar.

The screenshot shows a software interface for a sales order. At the top, there is a navigation bar with a back arrow, the text 'Sales Order', and several icons (edit, share, add, delete). Below this is the document title 'S-ORD101001 · Adatum Corporation'. A menu bar contains options: Home, Prepare, Print/Send, Request Approval, Order, Report, and More options. Below the menu bar are several action buttons: Post, Release, Create Warehouse Shipment, Create Inventory Put-away/Pick, Archive Document, and Rich Text. The 'General' section contains a grid of fields for Customer Name, Contact, Document Date, Posting Date, Order Date, Due Date, Requested Delivery Date, External Document No., and Status. The 'Lines' section has a sub-menu with 'New Line', 'Delete Line', 'Select items...', and 'Rich Text' (highlighted with a red box). Below the sub-menu is a table with columns: Rich Text, Type, No., Item Reference No., Description, Location Code, Quantity, Qty. to Assemble to Order, Reserved Quantity, Unit of Measure Code, Unit Price Excl. Tax, Tax Area Code, Tax Group Code, Line Discount %, Line Amount Excl. Tax, Service Commitments, Customer Contract No., Vendor Contract No., and An Includ. The table contains one row for 'ATLANTA Whiteboard, base' with a quantity of 12 and a unit price of 1,397.30. At the bottom, there is a summary table with columns for Subtotal Excl. Tax (USD), Invoice Discount %, Total Excl. Tax (USD), Total Tax (USD), and Total Incl. Tax (USD).

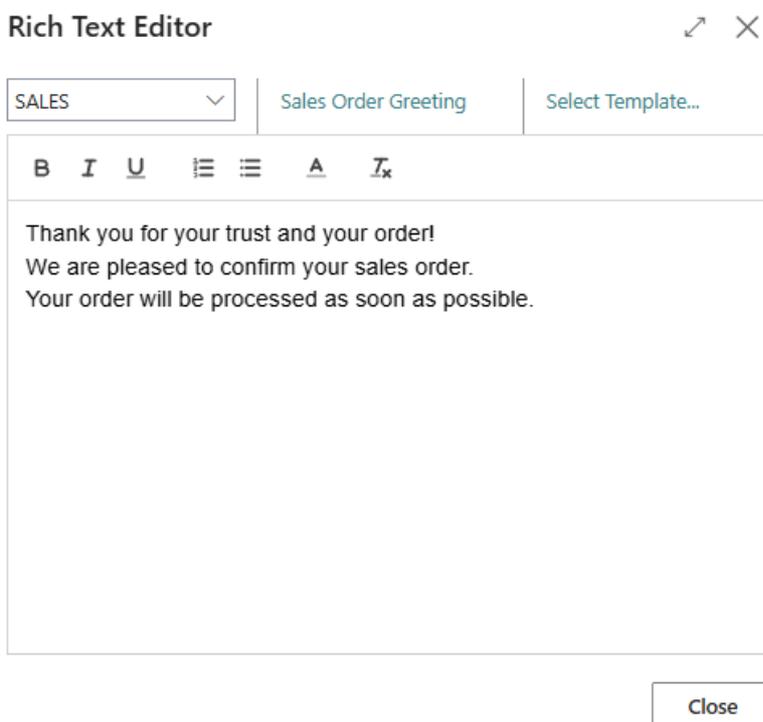
Rich Text	Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Service Commitments	Customer Contract No.	Vendor Contract No.	An Includ.
	Item	1996-5		ATLANTA Whiteboard, base		12			PCS	1,397.30	ATLANTA, GA	FURNITURE		16,767.60	0			17,7

Subtotal Excl. Tax (USD)	Invoice Discount %	Total Excl. Tax (USD)	Total Tax (USD)	Total Incl. Tax (USD)
16,767.60		16,767.60	0	1,006.06
0.00			16,767.60	17,773.66

3. The **Rich Text Editor** window is displayed.



- Specify the type of rich text in the dropdown list. The description of the rich text type is displayed to the right of the dropdown list.
- In the **Rich Text Editor** window, click on the **Select template...** option and select one of the available templates. Alternatively, you can also enter the desired text directly in the window. For more information on how to create a rich text template, please refer to the chapter [Create Rich Text Template](#).



- The following options are available to you for designing the texts:
 - B** : To format the text **bold**, select the characters and click on this symbol.
 - I** : To format the text **italics**, select the characters and click on this symbol.
 - U** : To format the text **underlined**, select the characters and click on this symbol.
 - ☐☐☐** : To format the text as a **list**, select the characters and click on this symbol.
 - ☐☐☐** : To format the text as a **enumeration**, select the characters and click on this symbol.

-  : To format the text in **color**, select the characters and click on this symbol.
-  : To **delete** the **formatting** in a text, select the characters and click on this symbol.

You have added a rich text to a line. An icon in the **Rich Text** column in the document lines indicates whether a rich text is stored for the line.

Lines | Manage | Line | Order ⌕ ⌂

➕ New Line ✖ Delete Line 🔍 Select items... 📄 Rich Text ⌂

Rich Text	Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Service Commitments	Customer Contract No.	Vendor Contract No.	An Includin
	Item	1996-S		ATLANTA Whiteboard, base		12			PCS	1,397.30	ATLANTA, GA	FURNITURE		16,767.60	0			17.7
Subtotal Excl. Tax (USD)				16,767.60	Invoice Discount %			0	Total Tax (USD)			1,006.06						
Inv. Discount Amount Excl. Tax (USD)				0.00	Total Excl. Tax (USD)			16,767.60	Total Incl. Tax (USD)			17,773.66						

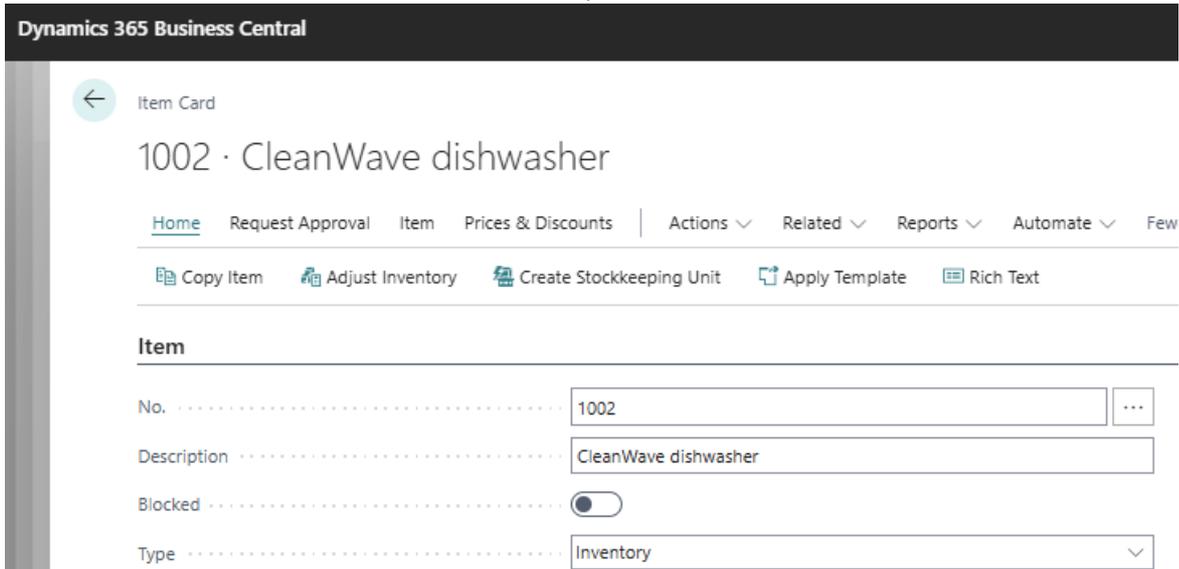
[Next Chapter](#)

Add Rich Text to Item

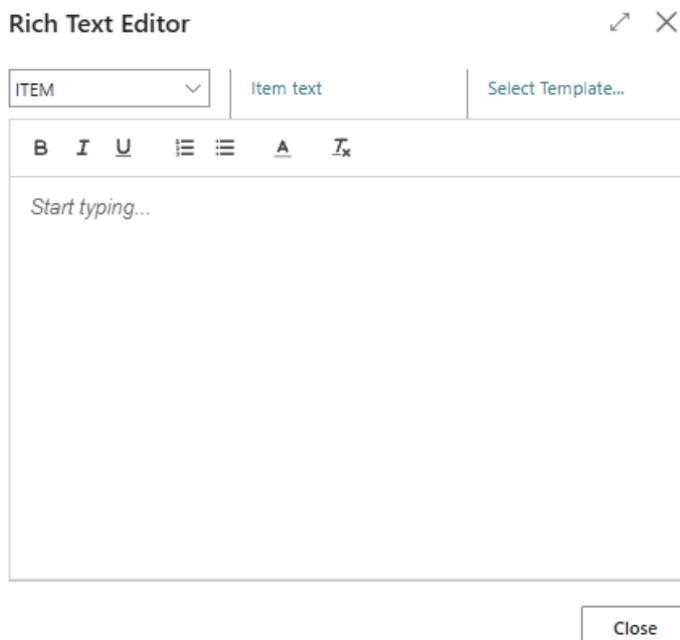
This chapter describes how to add a rich text to an item.

To add a rich text to an item, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Items** and click on the corresponding search result.
3. The **Items** list is displayed.
4. Open the item card for the item where you want to add a rich text.
5. The item card is opened.
6. Under the **Start** menu item, click on the **Rich Text** option.



7. The **Rich Text Editor** window is displayed.



8. Specify the type of rich text in the dropdown list. The description of the rich text type is displayed to the right of the dropdown list.
9. In the **Rich Text Editor** window, click on the **Select Template...** option and select one of the available templates. Alternatively, you can also enter the desired text directly in the window. For more information on how to create a rich text template, please refer to the chapter [Create rich text template](#).

Rich Text Editor



ITEM Item text [Select Template...](#)

B *I* U **A** ~~T_x~~

The **CleanWave dishwasher** is a modern, energy-efficient appliance featuring advanced cleaning technology. Equipped with a powerful inverter motor, it ensures quiet operation and a long service life.

The **integrated spray arm technology with multiple nozzles** provides even water distribution for optimal cleaning results, even with heavily soiled dishes.

[Close](#)

10. The following options are available to you for designing the texts:

11. **B** : To format the text **bold**, select the characters and click on this symbol.
12. *I* : To format the text **italics**, select the characters and click on this symbol.
13. U : To format the text **underlined**, select the characters and click on this symbol.
14. : To format the text as a **list**, select the characters and click on this symbol.
15. : To format the text as a **enumeration**, select the characters and click on this symbol.
16. **A** : To format the text in **color**, select the characters and click on this symbol.
17. ~~T_x~~ : To **delete** the **formatting** in a text, select the characters and click on this symbol.

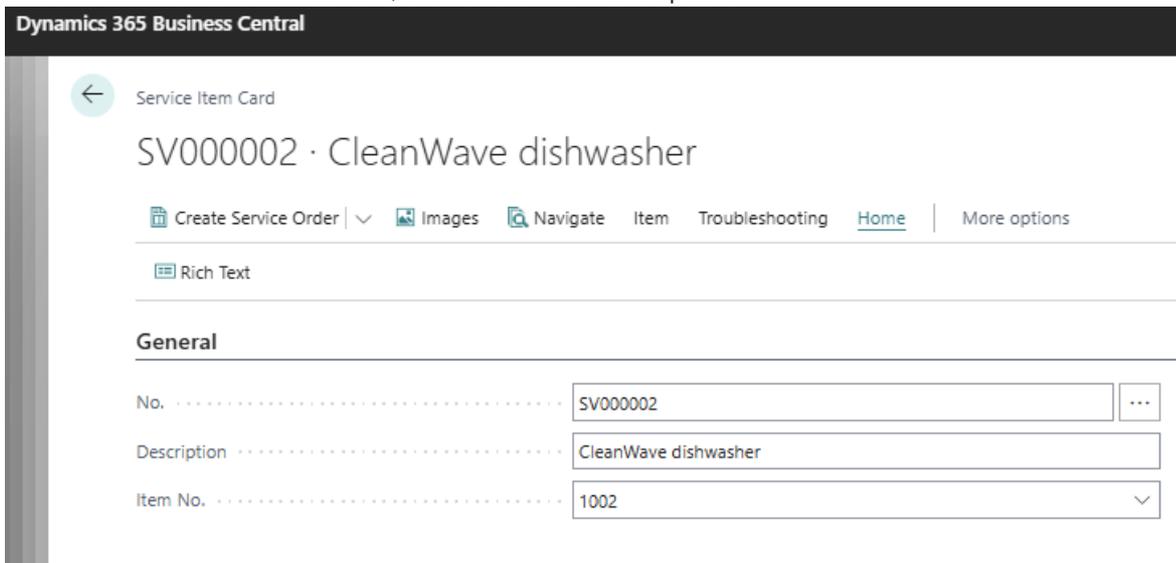
You have added a rich text to an item.

Add Rich Text to Service Item

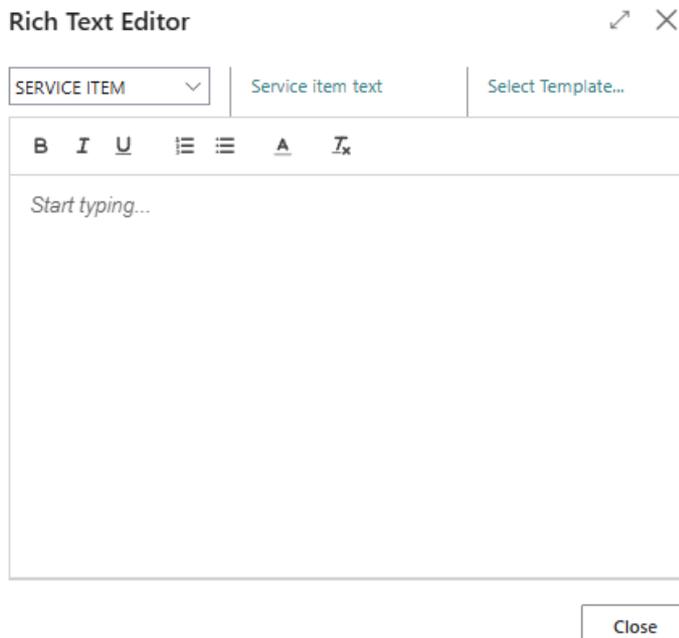
This chapter describes how to add a rich text to an service item.

To add a rich text to an service item, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Items** and click on the corresponding search result.
3. The **Items** list is displayed.
4. Open the service item card for the service item where you want to add a rich text.
5. The service item card is opened.
6. Under the **Start** menu service item, click on the **Rich Text** option.



7. The **Rich Text Editor** window is displayed.



8. Specify the type of rich text in the dropdown list. The description of the rich text type is displayed to the right of the dropdown list.
9. In the **Rich Text Editor** window, click on the **Select Template...** option and select one of the available templates. Alternatively, you can also enter the desired text directly in the window. For more information on how to create a rich text template, please refer to the chapter [Create rich text template](#).

Rich Text Editor



SERVICE ITEM ▾ | Service item text | Select Template...

B *I* U ☰ ☷ **A** ~~T_x~~

The **CleanWave dishwasher** is a modern, energy-efficient appliance featuring advanced cleaning technology. Equipped with a powerful inverter motor, it ensures quiet operation and a long service life.

The **integrated spray arm technology with multiple nozzles** provides even water distribution for optimal cleaning results, even with heavily soiled dishes.

Close

10. The following options are available to you for designing the texts:

11. **B** : To format the text **bold**, select the characters and click on this symbol.
12. *I* : To format the text **italics**, select the characters and click on this symbol.
13. U : To format the text **underlined**, select the characters and click on this symbol.
14. ☰ : To format the text as a **list**, select the characters and click on this symbol.
15. ☷ : To format the text as a **enumeration**, select the characters and click on this symbol.
16. **A** : To format the text in **color**, select the characters and click on this symbol.
17. ~~T_x~~ : To **delete** the **formatting** in a text, select the characters and click on this symbol.

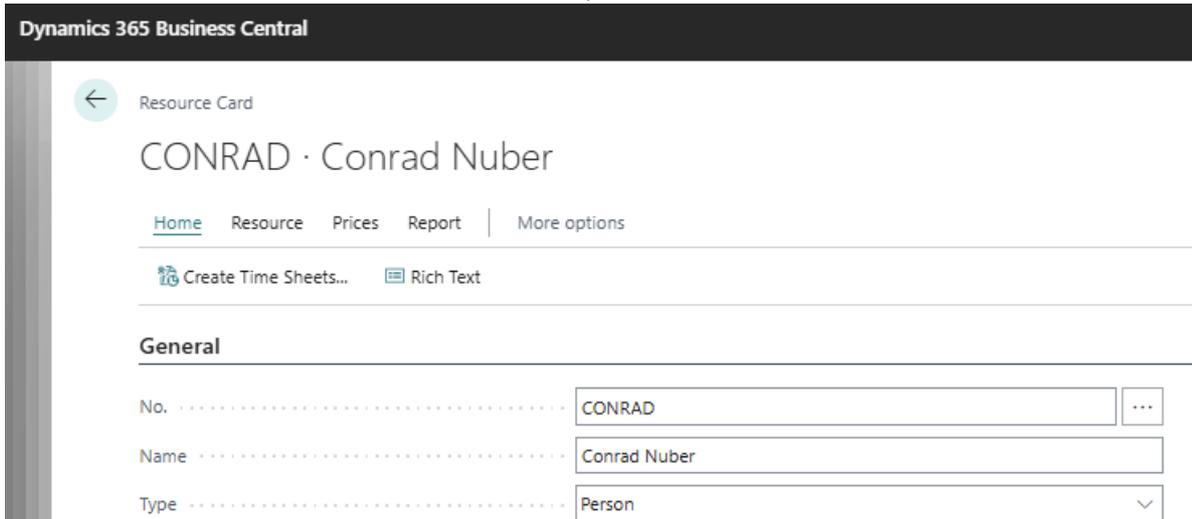
You have added a rich text to an service item.

Add Rich Text to Resource

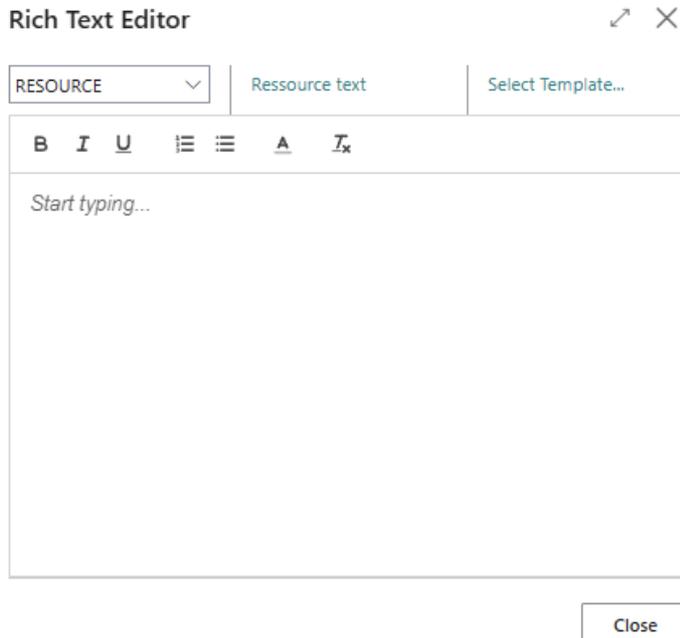
This chapter describes how to add a rich text to a resource.

To add a rich text to a resource, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Resources** and click on the corresponding search result.
3. The **Resources** list is displayed.
4. Open the resource card for the resource to which you want to add a rich text.
5. The resource card is displayed.
6. Under the **Start** menu item, click on the **Rich Text** option.



7. The **Rich Text Editor** window opens.



8. Specify the type of rich text in the dropdown list. The description of the rich text type is displayed to the right of the dropdown list.
9. In the **Rich Text Editor** window, click on the **Select Template...** option and select one of the available templates. Alternatively, you can also enter the desired text directly in the window. For more information on how to create a rich text template, please refer to the chapter [Create Rich Text Template](#).

Rich Text Editor



RESOURCE ▾ | Ressource text | Select Template...

B *I* U ☰ ☷ **A** ~~T_x~~

Conrad Nuber is a recognized expert in the field of engineering, with a particular focus on automation technology and digital system solutions. Thanks to his solid academic background and many years of practical experience, he combines theoretical knowledge with hands-on implementation expertise.

Close

10. The following options are available to you for designing the texts:

11. **B** : To format the text **bold**, select the characters and click on this symbol.
12. *I* : To format the text **italics**, select the characters and click on this symbol.
13. U : To format the text **underlined**, select the characters and click on this symbol.
14. ☰ : To format the text as a **list**, select the characters and click on this symbol.
15. ☷ : To format the text as a **enumeration**, select the characters and click on this symbol.
16. **A** : To format the text in **color**, select the characters and click on this symbol.
17. ~~T_x~~ : To **delete** the **formatting** in a text, select the characters and click on this symbol.

Sie haben einen Rich Text zu einer Ressource hinzugefügt.