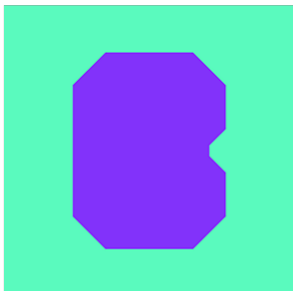




BEYOND

Rich Text



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Preface

This documentation contains information on how to install and operate **Beyond Rich Text** 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 Rich Text**.

Read this documentation in full to set up **Beyond Rich Text** 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 Rich Text** and keep the documentation in a place that is accessible to your employees.

DOWNLOAD
PDF

Manufacturer

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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 Rich Text** 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 Rich Text Documentation](#).

The examples described in this documentation represent only some of the possibilities offered by the **Beyond Rich Text** 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 Rich Text**. The following applications are required to use **Beyond Rich Text**:

- [Beyond License](#): Management of trial and full licenses for apps of BeyondIT.
- [Beyond Rich Text Editor](#): 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 Rich Text**.

To view the status of the product license for **Beyond Rich Text**, 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.

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.

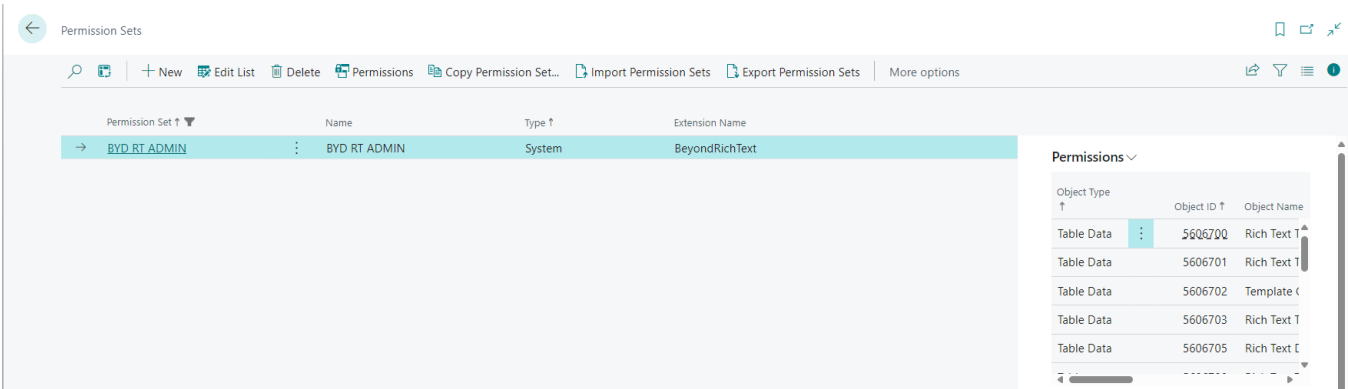
Assign User Permissions

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.

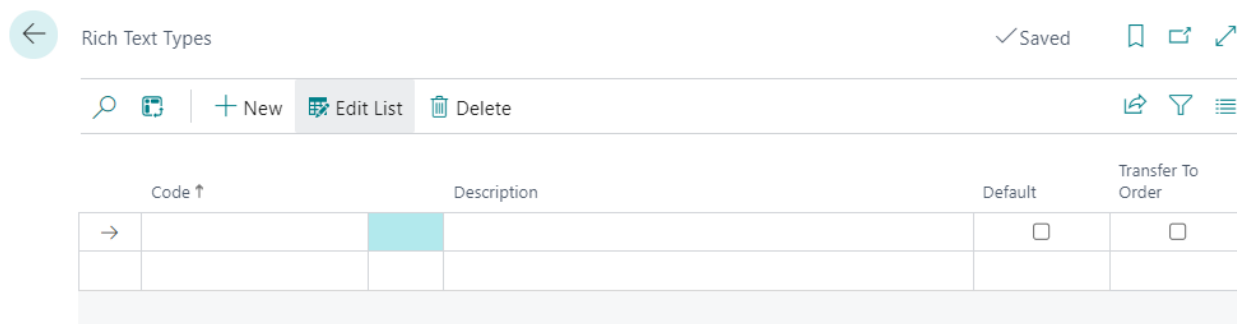
You have assigned a permission set for **Beyond Rich Text** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

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.



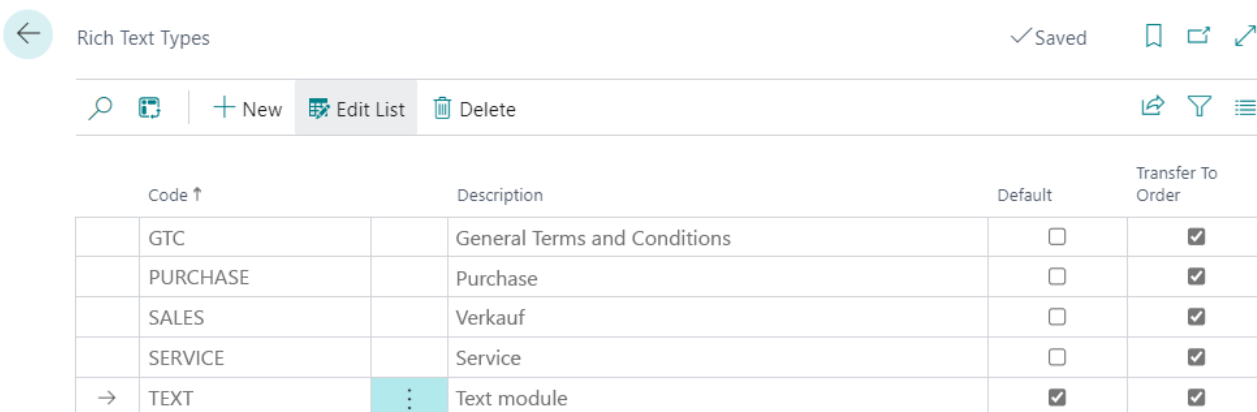
Rich Text Types

✓ Saved

+ New Edit List Delete

Code ↑	Description	Default	Transfer To Order
→		☐	☐

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.



Rich Text Types

✓ Saved

+ New Edit List Delete

Code ↑	Description	Default	Transfer To Order
	GTC	☐	☒
	PURCHASE	☐	☒
	SALES	☐	☒
	SERVICE	☐	☒
→	TEXT	☒	☒

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.

Rich Text Templates

+ New Edit List Delete

Table Id ↑	Table Caption	Type Code	Description	Language Code	Start Date
→ * [] ▼		*			

Rich Text Editor

B I U ☰ ☷ A T_x

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	Sales Greeting	DEU	1/1/1990	1/1/2027	☒	1

Rich Text Editor

B

I

U

☰

A

✕

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.
- **✕** : 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 Rich Text** allows you to save rich texts both to the document header and to individual lines within a document.

NOTE

If you use **Beyond Rich Text** together with **Beyond Document Designer**, 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 Document Designer**, please refer to the **Beyond Document Designer** 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

Show more

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

Show more

New Line

Delete Line

Select Items...

Rich Text

Show more

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

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

Rich Text Editor
↗ ✕

TEXT
▼

Rich Text

Select Template...

B
I
U
☰☰
A
T_x

Start typing...

Close

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](#).

Rich Text Editor
↗ ✕

SALES
▼

Sales Order Greeting

Select Template...

B
I
U
☰☰
A
T_x

Thank you for your trust and your order!
We are pleased to confirm your sales order.
Your order will be processed as soon as possible.

Close

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 Rich Text** allows you to save rich texts both at the document header and on individual document lines within a document.

NOTE

If you use **Beyond Rich Text** together with **Beyond Document Designer**, 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 Document Designer**, please refer to the **Beyond Document Designer** 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.

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.	Am 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

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

Rich Text Editor

↗

✕

TEXT
▼

Rich Text

Select Template...

B
I
U

≡

≡

A

*T*_x

Start typing...

Close

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](#).

Rich Text Editor

↗

✕

SALES
▼

Sales Order Greeting

Select Template...

B
I
U

≡

≡

A

*T*_x

Thank you for your trust and your order!
We are pleased to confirm your sales order.
Your order will be processed as soon as possible.

Close

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.

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

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

- o **$\mathcal{I}_x$** : 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 Includer
	Item	1996-S		ATLANTA Whiteboard, base		12			PCS	1,397.30	ATLANTA, GA	FURNITURE		16,767.60	0			17,773.66
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																		

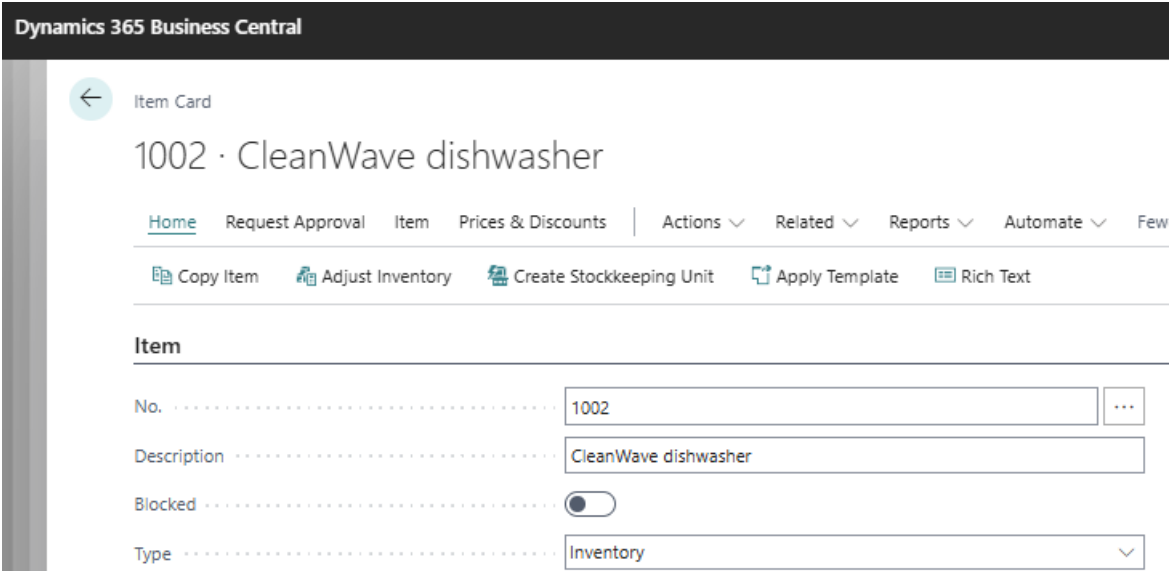
Next Chapter

Add Rich Text to Item

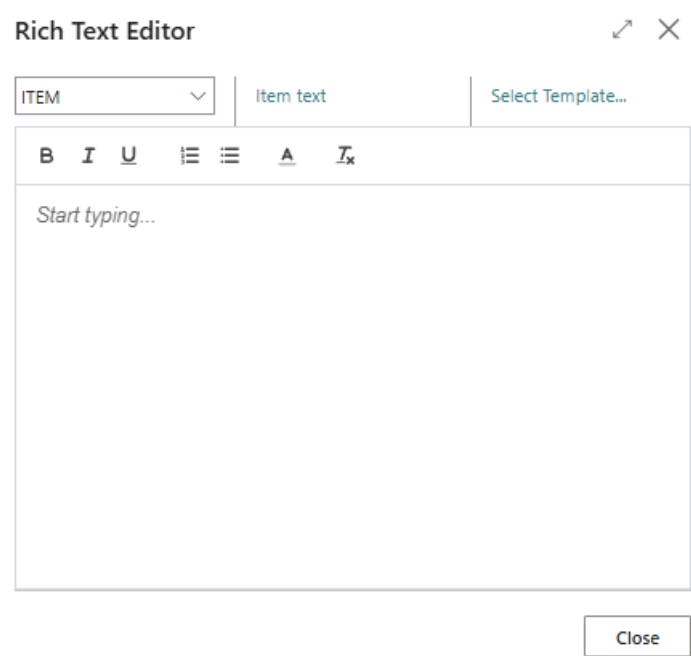
This chapter describes how to add a rich text to an item.

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** 

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

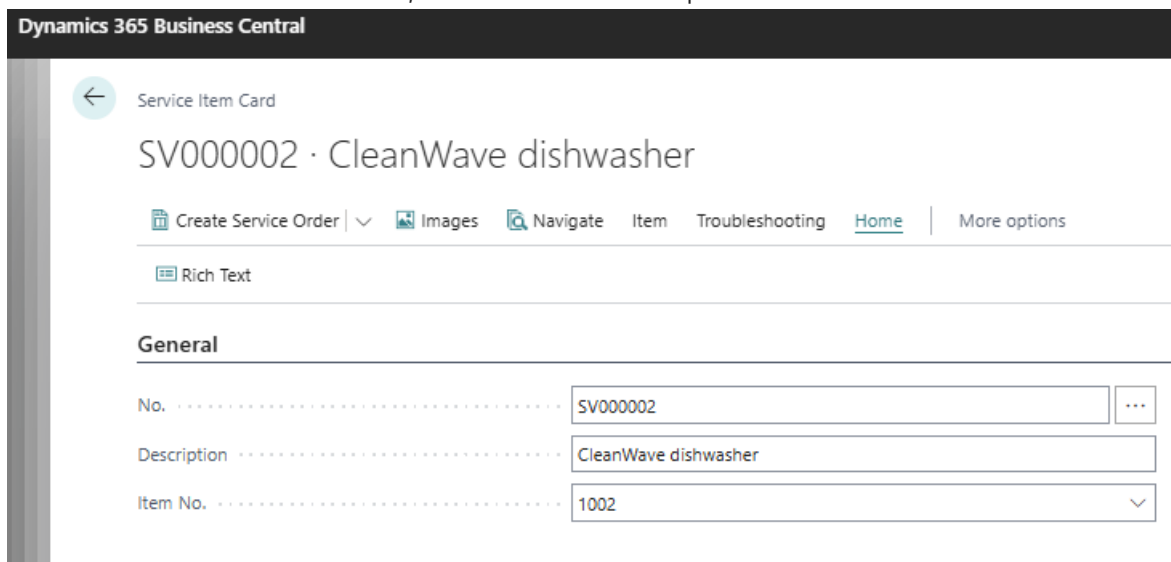
You have added a rich text to an item.

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.



Dynamics 365 Business Central

Service Item Card

SV000002 · CleanWave dishwasher

Create Service Order | Images | Navigate | Item | Troubleshooting | Home | More options

Rich Text

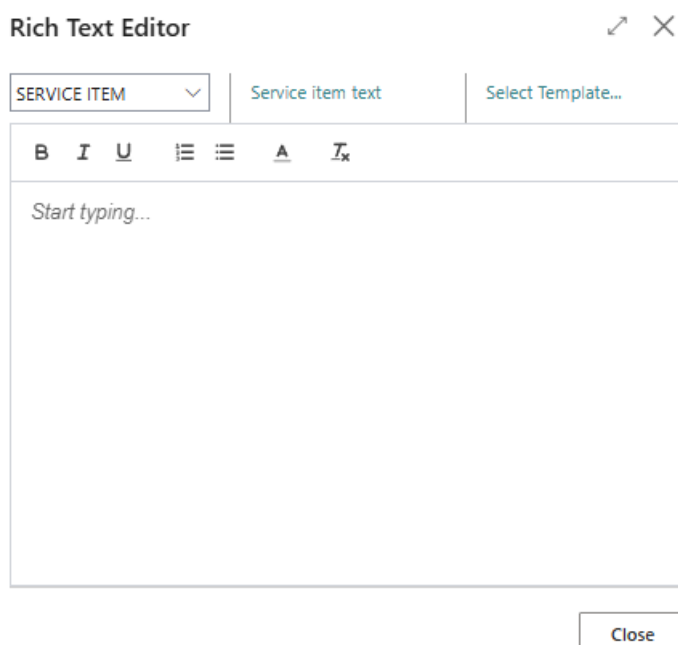
General

No. SV000002

Description CleanWave dishwasher

Item No. 1002

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



Rich Text Editor

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

B I U | **A** | **Ix**

Start typing...

Close

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>I</i> <u>U</u> 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. : To format the text in **color**, select the characters and click on this symbol.
17. : To **delete** the **formatting** in a text, select the characters and click on this symbol.

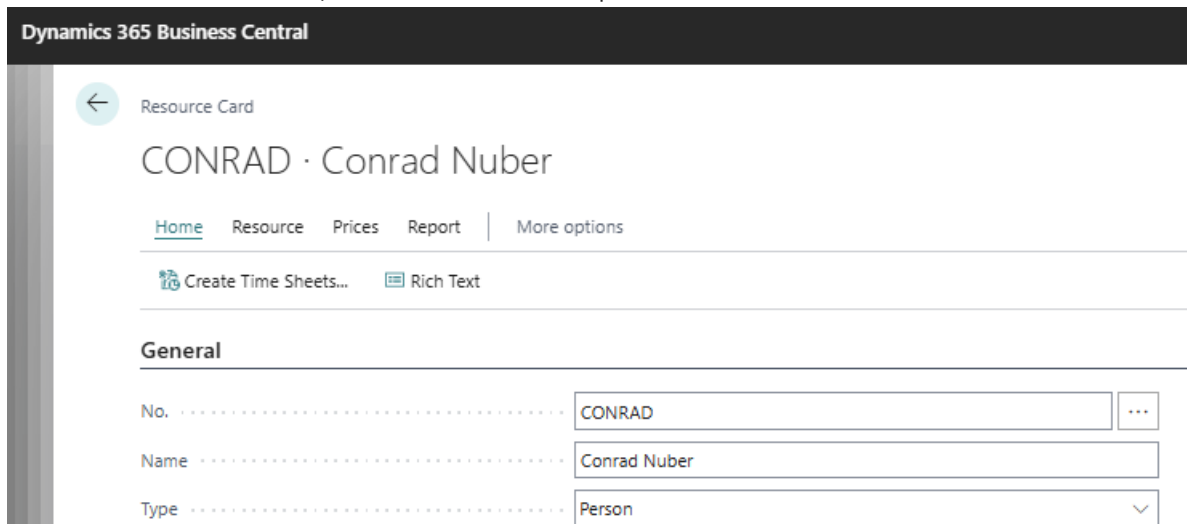
You have added a rich text to an service item.

Add Rich Text to Resource

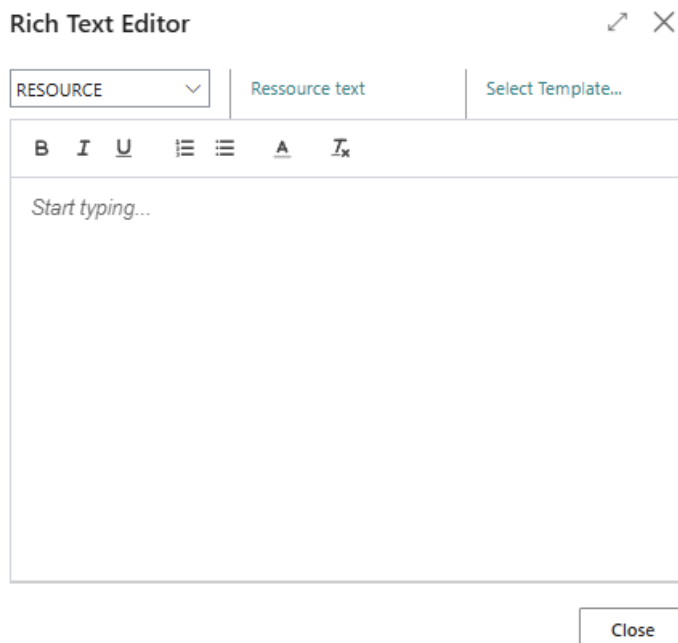
This chapter describes how to add a rich text to a resource.

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.