

Formatting Checklist:

Paperback/Hardcopy

- Review your distributor’s website for any specifications they may have
- Set page size
- Set margins to mirror and adjust size, then select “Different first page”
- Make sure that all chapter titles, POV indicators, or other headers are under the appropriate “Heading” styles
 - If you have not set up any italicized or bolded text via a style, use the search tool to select each respectively and set it up under another style. Otherwise these effects may be erased by later steps
- Make sure there is a section break at the end of each chapter (and POV if desired)
- Remove any tabs using the find and replace feature
- Using styles, adjust the text body:
 - Justify
 - Indent first line of the paragraph to desired depth
 - Set text to desired font
 - Double check that the font has no legal restrictions
 - Set text to desired size
 - Make sure it is easily legible in print (print sample page)
 - Set text to desired spacing
 - Turn on widow/orphan control in the paragraph settings
- Repeat for any italicized or bolded styles within the text body
- Using styles, adjust the headers:
 - Align as desired
 - Set text to desired font
 - Double check that the font has no legal restrictions
 - Set text to desired size
 - Make sure headers are at appropriate outline level
- If applicable, modify chapter heading style to start on an odd page (right-hand page)
 - If there is no option for that, insert an odd page section break at the end of each chapter
- Select “Different odd/even pages”
- Insert page numbers on both odd and even
 - Align as desired
- Insert header
 - Insert book title, author name, chapter title, or whatever is desired
 - Align as desired
 - If using unique chapter headers (as in, changing every chapter):
 - Select header at beginning of each chapter and deselect “Link to previous”
 - Repeat for even numbered pages
- Scan for any blank pages containing headers/footers:
 - If found, select header and footer, deselect “Link to previous,” then delete header and footer
 - Double check that this did not interfere with other headers/footers

Formatting Checklist: Paperback/Hardcopy

- Remove headers/footers from any introductory and closing pages
- Introductory pages:
 - Copyright notice
 - Acknowledgements
 - Maps, pronunciations, glossaries, series reading order, or any other optional information
 - Dedication, preface, foreword, or any other optional snippets
 - Title page
 - Note: Have each new category (e.g., map vs. dedication) start on an odd page
- Closing pages:
 - If a series, a blurb or excerpt of the next installment, or other information on the series
 - Author biography, website, or other information
 - Appendixes, glossaries, indexes, or other optional information
- If desired, insert clip art:
 - Ensure correct anchoring and alignment
 - Double check that all images match in size, placement, and opacity
- Adjust document view to 2 pages side-by-side and review entire document.
- Export as PDF
- Review entire document again through your distributor's preview after uploading

Formatting Checklist: E-book

- Review your distributor's website for any specifications they may have
- Make sure that all chapter titles, POV indicators, or other headers are under the appropriate "Heading" styles
 - If you have not set up any italicized or bolded text via a style, use the search tool to select each respectively and set it up under another style. Otherwise these effects may be erased by later steps
- Make sure there is a section break at the end of each chapter (and POV if desired)
- Remove any tabs using the find and replace feature
- Using styles, adjust the text body:
 - Justify
 - Indent first line of the paragraph to desired depth
 - Set text to desired font
 - Double check that the font has no legal restrictions
 - Set text to desired size
 - Set text to desired spacing
 - Note: Most e-book distributors have a standard font that your file will be adjusted to. Size is generally modifiable by the reader
- Repeat for any italicized or bolded styles within the text body
- Using styles, adjust the headers:
 - Align as desired
 - Set text to desired font
 - Double check that the font has no legal restrictions
 - Set text to desired size
 - Make sure headers are at appropriate outline level
 - Note: Most e-book distributors have a standard font that your file will be adjusted to
- Select "Different odd/even pages"
- Insert page numbers on both odd and even
 - Align as desired
- Insert header
 - Insert book title, author name, chapter title, or whatever is desired
 - Align as desired
 - If using unique chapter headers (as in, changing every chapter):
 - Select header at beginning of each chapter and deselect "Link to previous"
 - Repeat for even numbered pages
- Remove headers/footers from any introductory and closing pages
- Introductory pages:
 - Copyright notice
 - Acknowledgements
 - Maps, pronunciations, glossaries, series reading order, or any other optional information
 - Dedication, preface, foreword, or any other optional snippets
 - Title page

Formatting Checklist: E-book

- Closing pages:
 - If a series, a blurb or excerpt of the next installment, or other information on the series
 - Author biography, website link, or other information
 - Appendixes, glossaries, indexes, or other optional information
- If desired, insert clip art:
 - Ensure correct embedding, anchoring, and alignment
 - Double check that all images match in size, placement, and opacity
 - Check again within e-pub viewer (or the previewer of your desired distribution platform) to ensure proper image embedding
 - Note: Some e-book programs will require you to embed images using their software
 - Note: Too many unique images will create a large file size and may cause issues or higher prices with your distributor. Should this occur, compress images individually or compress the final manuscript file
- Insert Table of Contents in the opening pages (not always required, but often strongly recommended by e-book distributors)
 - Make sure it properly reflects the outline of your book
 - If any changes are made to the document after this, select Table of Contents and click “Update”
- Review entire document.
- Export as .docx, .epub, or whatever your distributor specifies
- Review entire document again through your distributor’s preview after uploading

Tips:

- When drafting your manuscript, try to incorporate some elements of formatting such as using the Styles bar and inserting section breaks at the end of each chapter. This will make life a lot easier during the formatting process.
- Always save formatted versions as new, separate documents—don't save over your unformatted draft.
- Work with “show editing” or “show all” on (often depicted with the paragraph symbol: ¶). This will help you see any hidden pages, section breaks, and more.
- When in doubt, look it up. Include your software type and model year in your search for more accurate information.
- Research industry standards for everything—especially measurements (e.g., indent depth or margin size).
- If you have a series, make sure that the formatting is consistent across each book.
- Make sure that you are familiar with any specifications your distributor may have regarding book format and layout.
- Find books that have an appealing layout and incorporate those elements that you like.
- Always order a printed proof and review the entire product before releasing the book. You don't have to fully re-read, but do flip through every page to make sure everything is laid out correctly.
- Take your time and take breaks. Working while rushed and stressed, or for long periods of time, can cause you to miss details. Give yourself the time you need to make your book shine.