



# Worksheet: Formatting Your Book for Print & Digital

Use this worksheet to organize your formatting plan, ensure platform compatibility, and confidently prepare your book for publication.

## PART 1: Define Your Format Strategy

What formats will you publish your book in?

☐ eBook (Kindle, ePub) ☐ Paperback (KDP, IngramSpark) ☐ Hardcover (optional) ☐ Audiobook (handled separately)

Which publishing platform(s) are you using?

☐ Amazon KDP ☐ IngramSpark ☐ Draft2Digital ☐ Apple Books ☐ Kobo ☐ Other: \_\_\_\_\_

Trim Size Selected for Print Edition (if applicable):

☐ 6" x 9" ☐ 5.5" x 8.5" ☐ Other: \_\_\_\_\_

Estimated Final Page Count: \_\_\_\_\_

## PART 2: Choose Your Formatting Tool

Which formatting tool are you using?

☐ Google Docs ☐ Microsoft Word ☐ Vellum (Mac only) ☐ Adobe InDesign ☐ Other: \_\_\_\_\_

File Types You'll Need to Export:

☐ PDF for Print ☐ EPUB for eBook ☐ MOBI (legacy Kindle format, optional) ☐ DOCX (editable backup)

## PART 3: Setup Essentials Checklist

Complete the following for both print and digital formats:

Formatting Element Completed?

- ☐ Chapter titles styled consistently using Heading 1
- ☐ Page breaks inserted at the end of each chapter
- ☐ Table of Contents created (linked for eBook)
- ☐ Front matter included (title page, copyright, dedication)
- ☐ Page numbers added (for print only)
- ☐ Headers and footers styled (for print)
- ☐ Font and spacing set to industry standard
- ☐ Margins and gutter spacing configured (for print)
- ☐ All images resized and centered (if used)
- ☐ Author bio and "About This Book" section added

## PART 4: Export and Test

File Export Checklist:

Task	Format	Done?
Exported PDF for print (with embedded fonts)	<input type="checkbox"/>	<input type="checkbox"/>
Exported EPUB for Kindle/eBook	<input type="checkbox"/>	<input type="checkbox"/>
Ran Kindle Previewer to test EPUB layout	<input type="checkbox"/>	<input type="checkbox"/>
Checked formatting on phone/tablet	<input type="checkbox"/>	<input type="checkbox"/>
Uploaded files to test on Amazon KDP or IngramSpark	<input type="checkbox"/>	<input type="checkbox"/>



## PART 5: Revisions & Final Polish

What formatting issues (if any) did you find during testing?

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What needs to be corrected before upload?

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Have you verified the spine width and dimensions for your print cover file?

☐ Yes ☐ Not yet

## PART 6: Final Readiness Check

Final Trim Size Confirmed: \_\_\_\_\_

Print-Ready Interior File Type:

☐ PDF ☐ DOCX (backup)

eBook-Ready File Type:

☐ EPUB ☐ MOBI (legacy)

Uploaded To:

☐ Amazon KDP ☐ IngramSpark ☐ Other: \_\_\_\_\_

Test Copies Ordered (optional but recommended)?

☐ Yes ☐ Not yet ☐ Not applicable

## PART 7: Notes & Next Steps

What part of formatting surprised you (or challenged you)?

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What is the final step before you publish?

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Estimated publication date: \_\_\_\_\_