

# EBook Formatting Checklist

## Step 1: Does your document include all content?

Not all books will use all of these pieces, but use this list to consider what else you need to write before you format your book.

- Cover Page (Title and author name)
- Copyright page
- Dedication
- Table of Contents
- Manuscript
- Notes
- Bibliography
- Appendices
- Thanks
- Sample chapter for your next book
- Page linking to your website

## Step 2: Final Word Processor Formatting

Once all of these steps are finished, we are leaving comfortable editing territory, so while we're still in a word processor, make sure you are done with edits. If you don't know how to use Find & Replace All, you will not get very far. It's usually ctrl+f on Windows and cmd+f on Mac.

- Run a final spelling & grammar check
- Use show/hide ¶ button to see formatting
- Make sure "smart" or "curly" quotes are turned on. Replace all ' with ‘ and all “ with “ (Sounds weird, but trust me on this. Just turn on smart quotes and do it.)
- Replace all . . . with ...
- Check for double spaces
- Replace all ctrl+i with <i>^&</i>
- Replace all – with –

## Step 3: Basic Formatting in a Text Editor

Hold onto your hats, folks: this is the point at which you're going to want to be 99% done with all edits, because working with the text will be difficult from here on out unless you're very comfy with Find & Replace. In many of the article supporting ebook formatting, what we're about to do is known as the "Nuclear Option." **Copy your document over to a new document in your text editor and save it as .html.**

The following list is a good set of very common characters that create problems, but remember to proof your formatted document: if a character isn't showing up, search for its html code.

- Replace `^(.+)$` with `<p>$1</p>`
- Replace `...` with `&hellip;`
- Replace `—` with `&mdash;`
- Replace `“` with `&ldquo;`
- Replace `”` with `&rdquo;`
- Replace `‘` with `&lsquo;`
- Replace `’` with `&rsquo;`
- Replace `é` with `&eacute;`
- Replace `à` with `&agrave;`
- Replace `©` with `&copy;`
- Replace whatever you're using as a scene break character with properly tagged string.
  - Example: Replace `***` with `<p class="centered"><span class="centered">***</span></p>`

## Step 4: Deal with the Table of Contents

It is theoretically possible to have your Tables of Contents (TOC) work automatically if you built it correctly in Word and nothing went sideways in the port to plain text. Assuming, however, that your experience is more typical, this is how you build a linked TOC by hand for Kindle. ([Smashwords is a different can of worms, sorry: here's a detailed resource for that.](#))

### 1. Each linked item in your TOC should have a line that looks something like this:

```
<p><a href="#pref">PREFACE</a></p>
```

### 2. You will choose a tag (`#pref`) and what to call the line in the TOC (PREFACE).

The case (all caps, mixed case, etc.) does matter, so if you want mixed case, type in mixed case. Numbers and punctuation should be fine, but if you use any of the special characters noted in Step 3, be sure to replace them with the html string.

```
<p><a href="#pref">PREFACE</a></p>
<p><a href="#ch1">CHAPTER ONE</a></p>
<p><a href="#ch2">CHAPTER TWO</a></p>
```

### 3. Each title reference in the TOC should have a linked heading in the manuscript.

The class tag controls the formatting that will be set in Step 6. Each id should match the tag you chose in the TOC.

```
<p class="chapter"><a id="ch1">Chapter One</a></p>
```

### 4. A note on footnotes.

If you want linked footnotes, you can use the same anchor link process to link to the number of a note on a notes page. Surround note numbers in the text with `<sup></sup>`.

## Step 5: Add Page Breaks

First things first: pages don't exist in ebooks. If you try to make them, you will go insane. What you can do is force a break in between things like chapters and pages of front matter, etc. How well this trick works depends on the platform you're using and may not be necessary with good CSS, but for Kindle, I stick this into the html where I want breaks and it seems to work:

```
<mbp:pagebreak/>
```

## Step 6: Add Links

If you're a savvy indie publisher in the digital age, you'll take advantage of having a reader in front of your work to direct their attention to more. Other books for sale, your website, your Patreon account, the sign-up form for your email list: get it in front of their eyeballs!

**This is how you format a link:**

```
<a href="http://melissawalsh.com">Visit my website!</a>
```

**Which will look like this on the page:**

[Visit my website!](http://melissawalsh.com)

## Step 7: Add HTML Header

You're not going to understand this next bit unless you decide to learn a little CSS. You might want to do that, in fact, if you'd like to be super fussy about how pretty your book is, but if you use this code as is, you'll be fine.

**1. Copy the following into the very top of your html document.**

```
<?xml version="1.0" encoding="utf-8"?>
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Strict//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-strict.dtd">
<head>
  <style type="text/css">
    html, body, div, h1, h2, h3, h4, h5, h6, ul, ol, dl, li, dt, dd, p, pre, table, th, td, tr { margin: 0;
padding: 0em; }
    p
    {
      text-indent: 1.5em;
      margin-bottom: 0.2em;
    }
    p.chapter
    {
      text-indent: 1.5em;
```

```

font-weight: bold;
font-size: 2em;
page-break-before: always;
margin-top:5em;
margin-bottom:2em;
}
p.centered
{
text-indent: 0em;
text-align: center;
}
span.centered
{
text-indent: 0em;
text-align: center;
}
</style>
</head>
<body>

```

## 2. Copy the following a the very end of the document.

```
</body>
```

## Step 8: Test that puppy!

Save your document as .html and open it in a browser (Chrome, Firefox, etc.).

- Test the TOC links.
- Test footnotes, if applicable.
- Do searches for < and > to look for any open tags.
- Check to make sure all external links are working.
- Scan the text to make sure the formatting looks uniform.
- Look for any last weird or broken characters.

## Step 9: Build that eBook, Baby!

Time to prep your book to go on its formatted way to the various publishers.

- **Smashwords:** Copy your webpage (what you see in a browser) back into a word processor and save as a .DOC.
- **Kindle:** Upload as .HTML or use Calibre to build .EPUB
- **B&N:** You can go through Smashwords or use Calibre to build .EPUB.

### How to use Calibre:

- Click “Add Books.”
- Select your polished .html file.
- Click on the book in your library list and click “Convert Books.”

- Under Metadata:
  - Enter Title, Author, Series, etc.
  - Upload your cover.
  - Choose format.
- Click OK. The conversion process will start. Your book file will be in the folder your designated for your library when you set Calibre up.