

The File Upload allows you the option of importing files that contain the tax information instead of manually entering the data.

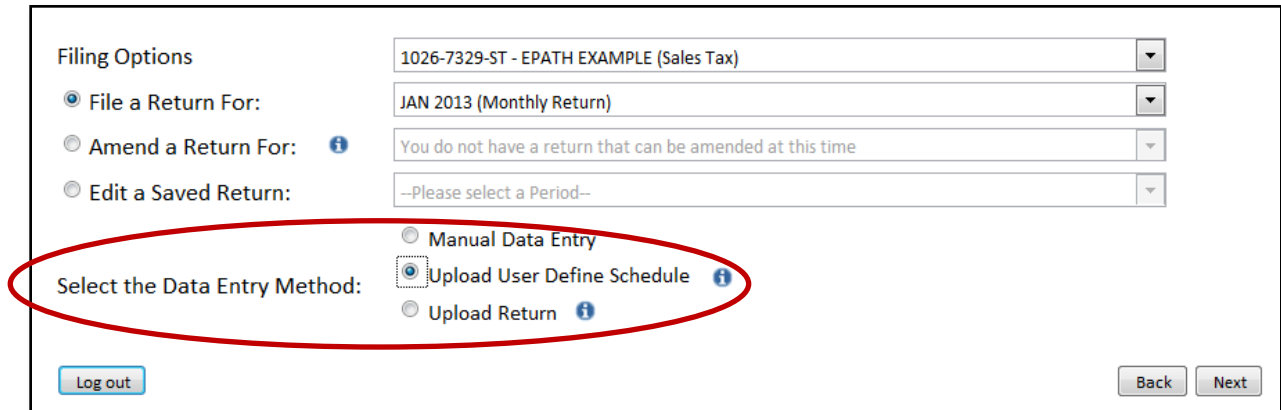
Two Upload methods are available.

1. Upload User Define Schedule – allows you to create a .csv or .txt file to upload any tax data that is reported using a corresponding tax code. You may use the .csv and .txt files you previously used in SD Quest to upload city taxes, Special Jurisdiction taxes, Tourism Tax, Motor Vehicle Leasing, Wireless Telecommunication Excise Tax, and Sioux Falls Lodging Taxes.

2. Upload Return – allows you to upload all return data or part of the return data using an Excel or CSV template. You may use a template provided under EPath Help – Forms or create your own using the instructions for required field names and column headings.

This document covers the Upload User Define Schedule.

1. File Preparation for Upload User Defined Schedule
2. Uploading User Defined Schedule
3. Completing the Return



The screenshot shows the 'Filing Options' section of the EPath web interface. It includes three radio button options for filing: 'File a Return For:', 'Amend a Return For:', and 'Edit a Saved Return:'. Each option has a corresponding dropdown menu. The 'File a Return For:' option is selected, and its dropdown menu shows 'JAN 2013 (Monthly Return)'. The 'Amend a Return For:' option is disabled, showing the message 'You do not have a return that can be amended at this time'. The 'Edit a Saved Return:' option is also disabled, showing the message '--Please select a Period--'. Below these options is the 'Select the Data Entry Method:' section, which has three radio button options: 'Manual Data Entry', 'Upload User Define Schedule', and 'Upload Return'. The 'Upload User Define Schedule' option is selected and circled in red. At the bottom of the form, there are three buttons: 'Log out', 'Back', and 'Next'.

You may use the .csv and .txt files you previously used in SD Quest. However, you may need to modify your files to remove certain codes.

The initial set up will take you a few minutes; however, the system will retain this information for future filings. You will only need to change this information should you change the fields or layout of your file.

1. File Preparation for Upload User Defined Schedule

Only **.txt** or **.csv** file extensions may be used for the User Defined Upload.

To convert your file to a **.txt** or **.csv** file open your current file in the software application you normally use (Excel, Access, Lotus, Works, etc). Click on File, Save As, then within the "Save As" box, choose either **.txt** or **.csv** as the "Save as type".

This file must contain the following two fields:

A. Tax Code: Required field length 4 characters. Numbers only. (Example: 0012)

- DO NOT use dashes, hyphens, commas, or letters.
- DO NOT use Duplicate codes. If a code is listed more than once, only the last record containing that code will be saved.

TIP: When using a **.csv** file, if the leading 0s in the code do not show in your file (0012 displays as 12), this may cause the upload to pull incorrect numbers into the code field. Try formatting the code column using the custom form of 4 zeros (0000), then save your **.csv** file.

Sales and Use Tax Return Tax Codes

You may include the codes for the following taxes on your sales tax return:

- Municipal general sales tax (Any municipal code ending with a "2")
- Municipal gross receipts tax (Any municipal code ending with a "1")
- Tourism Tax (code 7001)
- Special Jurisdiction Tourism Tax (codes 4085, 4125, 4135, 4175)
- Special Jurisdiction sales and use tax (codes 4084, 4114,4124, 4134, 4144, 4174,4184)
- Motor Vehicle Leasing (code 6001)
- Wireless Telecom Excise Tax (code 9001)
- Sioux Falls Lodging (code 8001)
- Intermediate Care Facility Tax (code 9501)

Do Not include codes for the following taxes on your sales tax return. These codes will create an error.

- Special Jurisdiction contractor's excise tax (codes 4082, 4112, 4122, 4132, 4142, 4172, 4182)
- Water Projects (contractors' excise tax) (codes 5022, 5051, 5061, 5071, 5082)

Contractor's Excise Tax Return Tax Codes

You may include codes for the following taxes on your contractors' excise tax return:

- Special Jurisdiction contractors' excise tax (codes 4082, 4112, 4122, 4132, 4142, 4172, 4182)
- Water Projects (contractors' excise tax) (codes 5022, 5051, 5061, 5071, 5082)
- Municipal general sales and use tax (Any municipal code ending with a "2")
- Special Jurisdiction sales and use tax (codes 4084, 4114, 4124, 4134, 4144, 4174, 4184)

Do Not include codes for the following taxes on your contractor's excise tax return. These codes will create an error.

- Municipal gross receipts tax (Any municipal code ending with a "1")
- Tourism Tax (code 7001)

- Special Jurisdiction Tourism Tax (codes 4085, 4125, 4135, 4175)
- Motor Vehicle Leasing (code 6001)
- Wireless Telecom Excise Tax (code 9001)
- Sioux Falls Lodging (code 8001)
- Intermediate Care Facility Tax (code 9501)

B. Net Taxable Amount: Maximum field length of 13 characters.

- The file may contain ONLY one record for each municipal tax code.
- You do not need to list municipal codes if no tax is due for that city.
- Negative taxable amounts need to be indicated with a “-”, -750.00.
Do not use parenthesis (), (76.34).
- Blank amount taxable fields will not be uploaded.

Records with errors will not be accepted by the system.

*City tax codes and rates can change every six months.
Be sure you are using the most current information.*

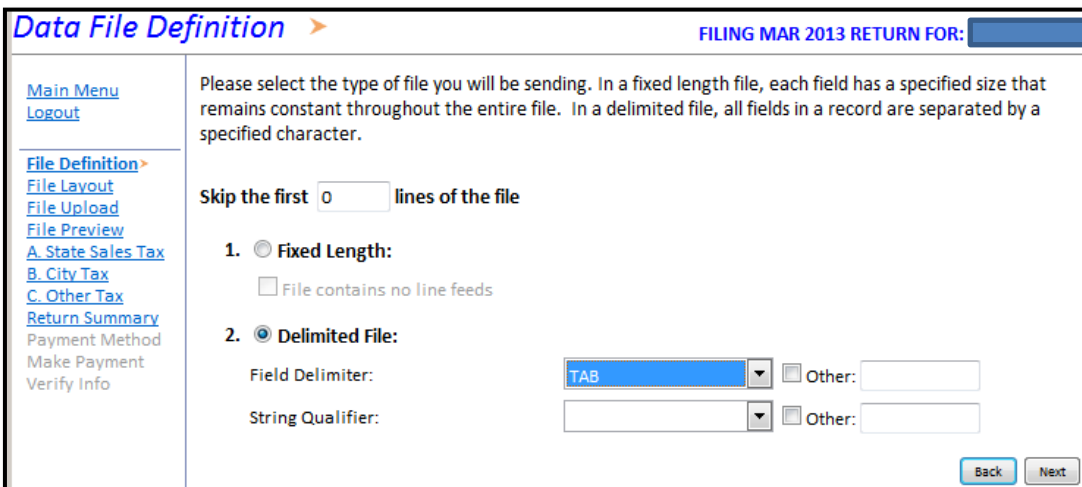
2. Uploading User Defined Schedule

A. On the Tax Return Filing Menu:

- ✓ Select the license
- ✓ Select the return
- ✓ Check “Upload User Define Schedule”
- ✓ Click Next

B. “Data File Definition” screen

This tells the system what fields contain the data and how to identify the fields in your file.



Skip the first lines of the file.

Enter the number of lines (rows) at the top of your file that do not contain tax data. These lines will not be uploaded. You will see an error message if you do not identify these lines.

Sample Data File			
Name	Code	Rate	Taxable
Aberdeen-G	0012	2.00%	7500
Akaska-G	0042	2.00%	45666

In this data file example,
Enter 1 to skip the heading row.

Indicate the file type:

- **Fixed Length** - In a fixed length file, each field has a specified size that remains constant throughout the entire file.
- **Delimited File** – In a delimited file, a specified character separates all fields in a record. If your file is delimited, you are required to name the field delimiter.
 - For **TXT** files, choose TAB delimiter.
 - For **CSV** files, choose COMMA delimiter.
- If a field in your file contains the same character defined as a field separator (delimiter) such as a “,” you can indicate that the information is one field by using a **string qualifier**.

Aberdeen-G	0012	2.00%	"7,500"
Akaska-G	0042	2.00%	"\$45,666"
Alcester-G	0062	2.00%	

Use the string qualifier at the beginning and the end of the field. For example, if your numbers contain commas the string qualifier may show this as “19,250.00”. the “ must be identified as the string qualifier for the upload to work properly.

C. Data File Layout

Delimited Files

The position identifies the columns in your file that contain the Tax Code and Amount Taxable.

Select the column using the drop down box under Position.

Data File Layout > FILING JAN 2013 RETURN FOR:

[Main Menu](#)
[Logout](#)

[File Definition](#)
[File Layout](#) >
[File Upload](#)
File Preview
A. State Sales Tax
B. City Tax
C. Other Tax
Return Summary
Payment Method
Make Payment
Verify Info

Describe the fields in your file using this section.

Delimited Files: Use the drop down box to select the Position of the columns containing the Tax Code and Amounts Taxable.

Fixed Length Files: Specify the size and position of the columns containing the Tax Code and Amounts Taxable.

Position	Field Name	Size	Include
2	Tax Code	4	Required
4	Amount Taxable	13	Required

[Reset Layout](#) | [Save Layout](#)

Fixed Length Files

Set the field size and starting position for the Tax Code and Amount Taxable.

Describe the fields in your file using this section.

Delimited Files: Use the drop down box to select the Position of the columns containing the Tax Code and Amounts Taxable.

Fixed Length Files: Specify the size and position of the columns containing the Tax Code and Amounts Taxable.

Position	Field Name	Size	Starting Position	Include
1	Tax Code	4	1	Required
2	Amount Taxable	13	5	Required

[Reset Layout](#) | [Save Layout](#)

D. Data File Upload

Select the file containing the data to upload for this return. Click Next.

Data File Upload > FILING MAR 2013 RETURN FOR:

[Main Menu](#)
[Logout](#)

[File Definition](#)
[File Layout](#)
[File Upload](#) >
File Preview
A. State Sales Tax
B. City Tax
C. Other Tax
Return Summary
Payment Method
Make Payment
Verify Info

Use the 'Browse' button to located the file from your computer that you want to upload to the server for processing. When finished click the 'Next' button to preview the contents of the file.

File Location

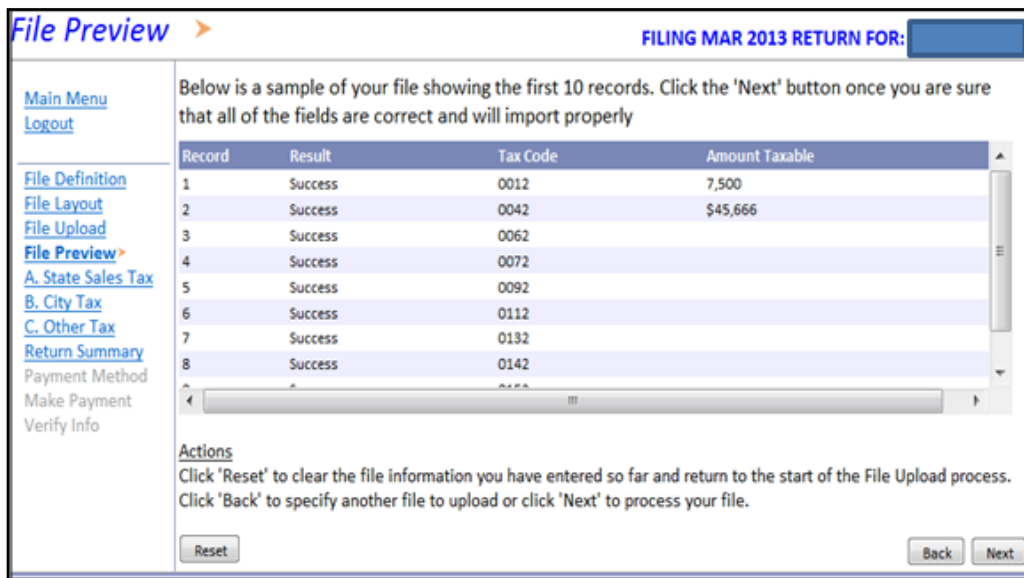
Actions
Click 'Next' to upload your file and process the data or click 'Back' to modify the layout of your import file. Click 'Reset' to clear the file location text box.

E. File Preview

File Preview displays the first ten records of your file to allow you to confirm the file is formatted properly and your fields are displayed correctly. Any errors in the remaining records will not be identified until you click next.

Only the Tax Code – which should show 4 numbers and the Amount Taxable, which may show \$ and commas and decimals, should be displayed.

If there are errors you will be given a chance to review the errors, correct and resubmit the upload.



File Preview FILING MAR 2013 RETURN FOR: []

Below is a sample of your file showing the first 10 records. Click the 'Next' button once you are sure that all of the fields are correct and will import properly

Record	Result	Tax Code	Amount Taxable
1	Success	0012	7,500
2	Success	0042	\$45,666
3	Success	0062	
4	Success	0072	
5	Success	0092	
6	Success	0112	
7	Success	0132	
8	Success	0142	
9			
10			

Actions
Click 'Reset' to clear the file information you have entered so far and return to the start of the File Upload process. Click 'Back' to specify another file to upload or click 'Next' to process your file.

If the tax code and Amount Taxable show incorrect items, go back and check your column positions.

If information appears correct, click next.

If there are errors in the file, the View Results screen will display the errors and provide error messages.

If there are no errors, the data is uploaded and the tax return will be displayed.

The following examples show how errors may appear on the File Preview page.

The first example pulled in the tax rate instead of the tax code because the wrong column was selected.

The second failed because an incorrect field was selected.

Below is a sample of your file showing the first 10 records. Click the 'Next' button once you are sure that all of the fields are correct and will import properly

Record	Result	Tax Code	Amount Taxable
1	Success	Rate	Taxable
2	Success		
3	Success		
4	Success		
5	Success		
6	Success	2.00%	"7,500"
7	Success	2.00%	"\$45,666"
8	Success	2.00%	

Actions

Below is a sample of your file showing the first 10 records. Click the 'Next' button once you are sure that all of the fields are correct and will import properly

Record	Result	Tax Code	Amount Taxable
1	Failed		
2	Failed		
3	Failed		
4	Failed		
5	Failed		
6	Failed	500"	
7	Failed	666"	
8	Failed		

Actions

Click 'Reset' to clear the file information you have entered so far and return to the start of the File Upload process.
Click 'Back' to specify another file to upload or click 'Next' to process your file.

F. View Results

The View Results page will list any errors along with error codes. To see the error code, click on "View".

If errors exist, you will need to fix them before you can continue. If the errors are in your data, open your file, correct the errors, and upload your file again.

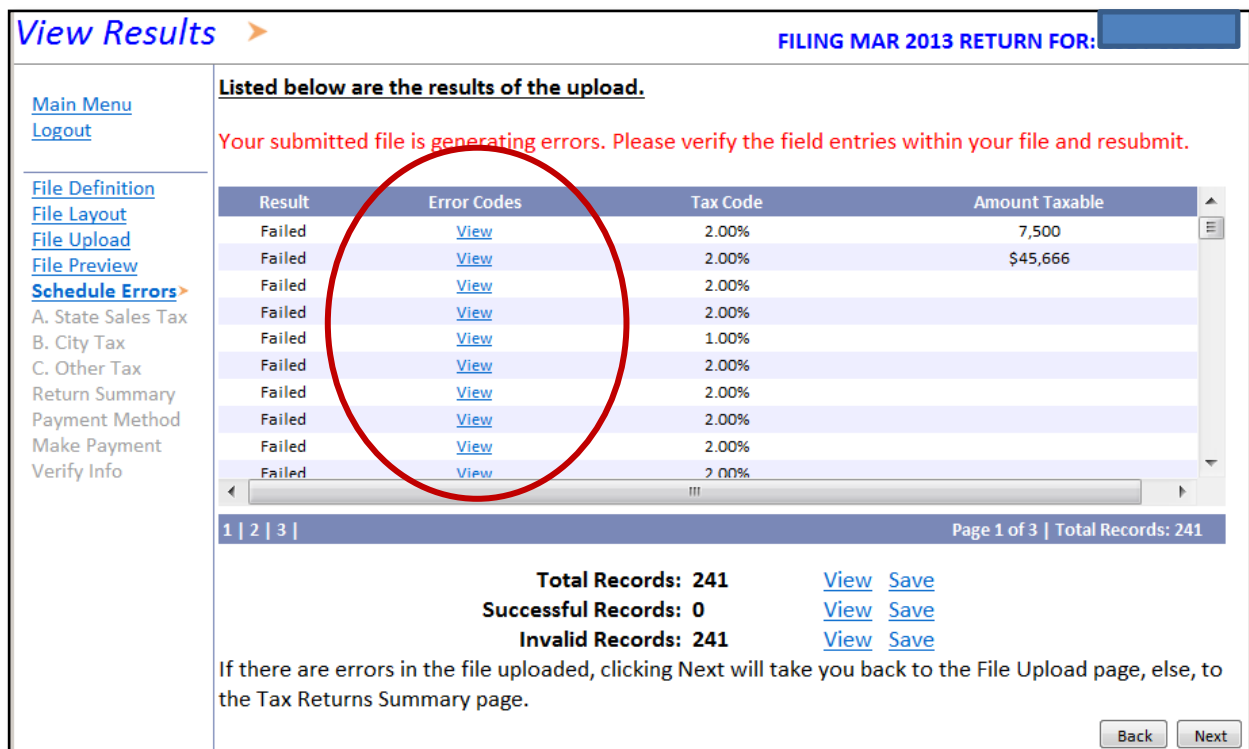
If the errors are in the field definitions as selected in EPath, go back to the File Definition screen and change the criteria.

Each upload removes all previously entered data on that return.

ERRORS or FAILED Upload

Click on the View under Error Codes to display what the error was.

In this example, the tax code is pulling in the tax rate because the wrong column was selected for the tax code.



View Results FILING MAR 2013 RETURN FOR: [REDACTED]

[Main Menu](#)
[Logout](#)

[File Definition](#)
[File Layout](#)
[File Upload](#)
[File Preview](#)
[Schedule Errors](#)

- A. State Sales Tax
- B. City Tax
- C. Other Tax
- Return Summary
- Payment Method
- Make Payment
- Verify Info

Listed below are the results of the upload.

Your submitted file is generating errors. Please verify the field entries within your file and resubmit.

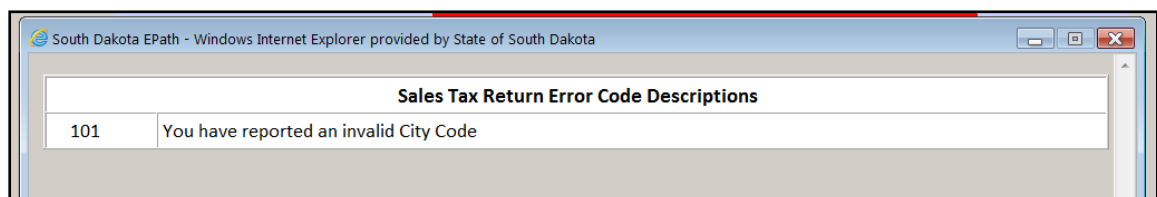
Result	Error Codes	Tax Code	Amount Taxable
Failed	View	2.00%	7,500
Failed	View	2.00%	\$45,666
Failed	View	2.00%	
Failed	View	2.00%	
Failed	View	1.00%	
Failed	View	2.00%	
Failed	View	2.00%	
Failed	View	2.00%	
Failed	View	2.00%	
Failed	View	2.00%	

1 | 2 | 3 | Page 1 of 3 | Total Records: 241

Total Records: 241 [View](#) [Save](#)
Successful Records: 0 [View](#) [Save](#)
Invalid Records: 241 [View](#) [Save](#)

If there are errors in the file uploaded, clicking Next will take you back to the File Upload page, else, to the Tax Returns Summary page.

Error Code View



South Dakota EPath - Windows Internet Explorer provided by State of South Dakota

Sales Tax Return Error Code Descriptions

101	You have reported an invalid City Code
-----	--

7. Completing the Tax Return

Sales and Use Tax Return

- You need to manually enter:
 - Line 1. Gross Sales,
 - Line 2. Use Taxable, and
 - Line 3. Non-Taxable Sales

Contractors' Excise Tax Return

- You need to manually enter:
 - Line 1. Gross Receipts from construction services or realty improvements,
 - Line 2. Owner Furnished Material,
 - Line 3. Deductions, and
 - Line 7. Net Amount subject to State Sales and Use Tax.

Review the remaining return.

If amounts are incorrect, you may manually enter the corrected amounts or you can correct your data and upload amounts again.

If you choose to upload corrected data, you will need to reenter any data you manually entered.

Follow instructions in the EPath help guide for setting up your payment and submitting the return.