

CREST: SALES REP TRACKER

IT Integration Reference Guide

Column Specifications · Export Instructions · CRM Compatibility

Overview

Crest: Sales Rep Tracker is a mobile iOS app that allows outside sales reps to import their daily sales report and instantly view GM%, commission earned, customer rankings, and goal progress. The app runs entirely on the device — no internet connection, no server, no cloud storage required.

This guide provides the technical specifications your IT team needs to generate a compatible export file from your CRM or ERP system.

Required Column Specifications

The export file must be in **Excel (.xlsx)** or **CSV (.csv)** format. Column names are not case-sensitive. The app includes a universal column mapper that recognizes common naming variations from BisTrack, CDK, Salesforce, and other systems.

Column Name	Data Type	Required	Description
CustomerCode or CustomerID	Text	Recommended	Unique customer identifier / account code
CustomerName or Customer	Text	Required	Customer or company display name
MTD_Sales or SalesMTD	Number	Required	Month-to-date gross sales dollar amount
MTD_Profit or ProfitMTD	Number	Required	Month-to-date gross profit dollar amount
MTD_GM or GMMTD	Number	Required	Month-to-date gross margin % (e.g. 27.5)
YTD_Sales or SalesYTD	Number	Required	Year-to-date gross sales dollar amount

YTD_Profit or ProfitYTD	Number	Required	Year-to-date gross profit dollar amount
YTD_GM or GMYTD	Number	Required	Year-to-date gross margin % (e.g. 27.5)

* *CustomerCode* is optional but recommended — it allows the app to match returning customers on subsequent imports.

* *GM%* values can be expressed as a decimal (0.275) or percentage (27.5) — the app detects the format automatically.

Accepted Column Name Aliases

The universal column mapper recognizes the following alternative column names. If your system uses a name not listed here, contact us and we will add it.

Field	Accepted Column Names
Customer Name	CustomerName, Customer, CompanyName, AccountName, Name, ClientName
Account Code	CustomerCode, CustomerID, AccountCode, Account#, AccountNo, Acct, ID
MTD Sales	MTD_Sales, SalesMTD, MonthlySales, MTDSales, CurrentMonthSales
MTD Profit	MTD_Profit, ProfitMTD, GPMTD, MTDPProfit, GrossProfitMTD
MTD GM%	MTD_GM, GMMTD, GMPercent, GrossMarginMTD, MarginMTD
YTD Sales	YTD_Sales, SalesYTD, AnnualSales, YTDSales, YearToDateSales
YTD Profit	YTD_Profit, ProfitYTD, GPYTD, YTDProfit, GrossProfitYTD
YTD GM%	YTD_GM, GMYTD, YTDMargin, GrossMarginYTD, MarginYTD

System-Specific Export Instructions

BisTrack

Export the standard Sales Analysis or Rep Performance report as Excel (.xlsx). The default BisTrack column names (CustomerCode, CustomerName, MTD_Sales, MTD_Profit, MTD_GM, YTD_Sales, YTD_Profit, YTD_GM) are natively supported — no column renaming required.

1. Go to Reports → Sales Analysis → Rep Performance

2. Set date range to current month / year

3. Select Export → Excel (.xlsx)

4. Email the file to the sales rep or save to shared drive

CDK Global

Export the Sales Representative Summary report from CDK Global. Column names may vary by configuration — refer to the alias table above to confirm compatibility.

1. Navigate to Reports → Sales → Rep Summary

2. Filter by rep and date range

3. Export as CSV or Excel

4. Send to rep via email or company file share

Salesforce

Create a custom report in Salesforce with Opportunity data grouped by Account. Export as Excel or CSV. Map your field names to the required columns using the alias table.

1. Go to Reports → New Report → Opportunities

2. Group by Account Name, add MTD/YTD fields

3. Run report → Export → Excel Format (.xlsx)

4. Email exported file to sales rep

Generic Excel/CSV

Any Excel (.xlsx) or CSV file with the required columns will work. Column names are not case-sensitive. Extra columns are ignored.

1. Ensure file has: CustomerName, MTD_Sales, MTD_Profit, MTD_GM, YTD_Sales, YTD_Profit, YTD_GM

2. First row must be column headers

3. Save as .xlsx or .csv

4. Send to rep via email

Delivering the File to the Sales Rep

Email	Email the .xlsx or .csv file directly to the sales rep. They tap the attachment on their iPhone to open in Crest.
Files App	Save to iCloud Drive or OneDrive. The rep opens the Files app on iPhone and imports from there.
AirDrop	AirDrop the file directly to the rep's iPhone. Instant delivery, no email required.
SharePoint	Save to a shared SharePoint folder. Rep accesses via Files app → SharePoint connector.

Privacy & Security

No data leaves the device. Crest stores all imported data locally in an on-device SQLite database. No data is transmitted to any server. No internet connection is required. No user accounts are created. The app does not collect analytics or usage data. Your sales figures remain completely private.

Questions & Support

If your CRM export format is not listed above or your column names are not recognized, contact us and we will add support for your system.

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App Store	Search "Crest Sales Rep Tracker"