



Link Field

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Connecting Data Across Different Tables Made Easy with Linked Records

Say Goodbye to manually entering updates across multiple work-stream. Using Zoho Tables link records, discover the dynamic relationship between your tables with no more duplication or conflicting edits. You can now experience the Zoho Tables' powerful feature by connecting all your pertinent data together.

While managing a workflow, a great deal of information needs to be tracked to stay on top of which team member is working on which project, or which supplier is being contracted for the purchase of certain commodities; keeping all the information in separate tables can be overwhelming and hard to follow!

In Zoho Tables, you can store each data set as separate tables, **yet avoid working in silos** by enabling linked records that create dynamic relationships between your records.

The three significant steps in setting up a streamlined workflow using linked records are as follows.

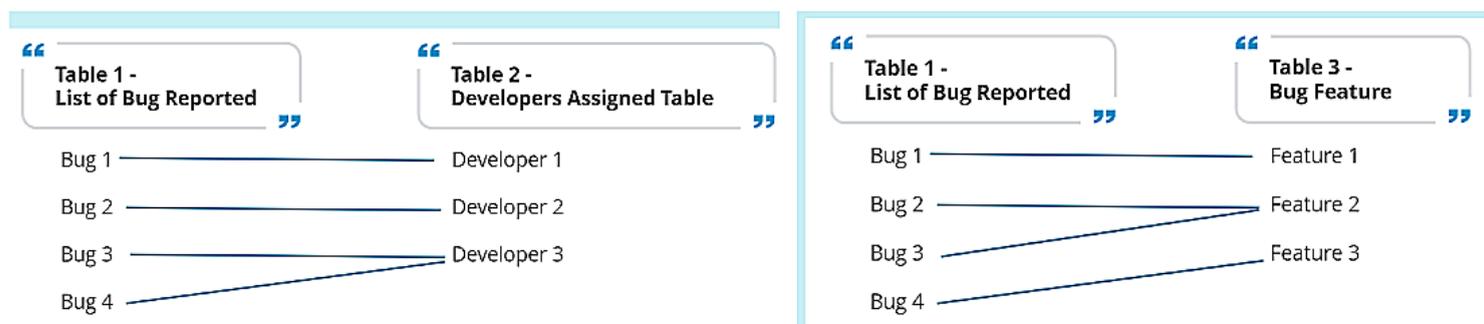
- Formulate your relationships
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Formulate your relationships

Before establishing a link between records, a clear understanding of the following information is needed to set up a meaningful workflow.

- What information are you tracking?
- How is the information organized in individual tables?
- Which field of a table holds the information that you are primarily looking for?
- How all the individual tables with data can be interconnected to create the desired workflow?

Let's look at an example of a team engaged in bug tracking. There are three major aspects they are mainly focusing on: List of bugs reported, List of Developers assigned to work, and listing of features detailing the bug's category. Each list can be saved as a separate table, but that doesn't mean they need to live separately.



In the above image, we have outlined individual tables for each list of activities. You may refer to it to understand how to connect your records to the related item to customize a workflow.

Create your relationships

Now that you have the outline of the workflow, it's time to execute the relationship between the records to see it in action.

The list of activities as individual tables is saved as follows:

- Table 1 - Bugs Reported
- Table 2 - Developers Assigned
- Table 3 - Feature

Now the first step is to create a link between table 1 and table 2 to assign developers to each bug reported by the team.

Let's go to the Table to create a link.

Step 1- **Select the link record field** from the list of fields available

Step 2- **Choose a table** to link to (Developers Assigned)

Step 3- From the Advanced option, **choose a display field** (Developer Name). The display field refers to the field from which you want to retrieve records.

Step 4- Click on **Create**

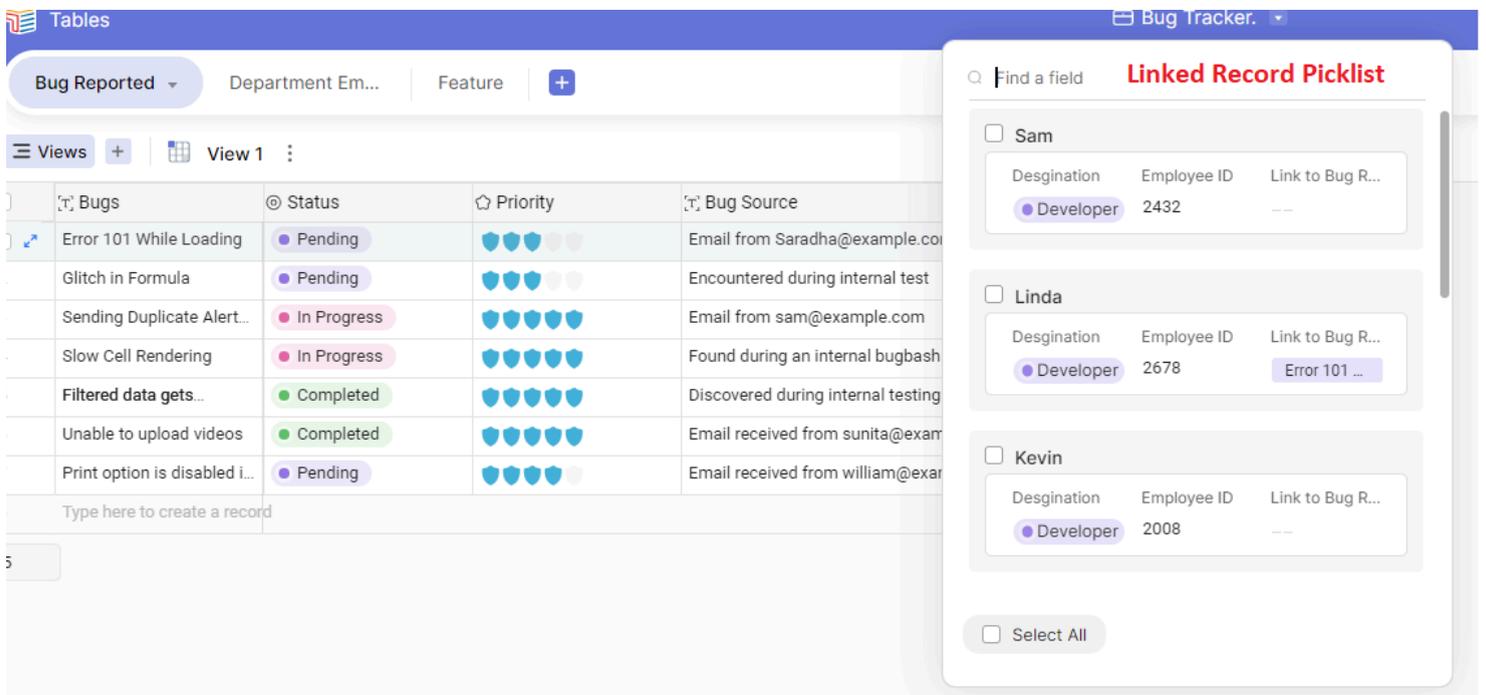
Now that your link field has been created, a reference field is also created for the related table.

Anytime you create a link between two records, it establishes a **correlated relationship** between the tables. This **cross-table connection** allows you to see records related to each other across tables, giving you an understanding of which task is related to which activity.

Bugs	Status	Priority	Bug Source
1 Error 101 While...	Pending	3	Email from Saradha@example.com
2 Glitch in Formula	Pending	2	Encountered during internal test
3 Sending Duplicate Alert...	In Progress	4	Email from sam@example.com
4 Slow Call Rendering	In Progress	3	Found during an internal bugbash
5 Filtered data gets...	Completed	4	Discovered during internal testing
6 Unable to upload videos	Completed	3	Email received from sunita@example.com
7 Print option is disabled i...	Pending	3	Email received from william@example.com
8 Type here to create a record			

Upon creating a relationship between records, simply click on the + **icon** to pull up the **linked record picklist** which displays the list of records from the linked table to choose from.

Linked Record Picklist

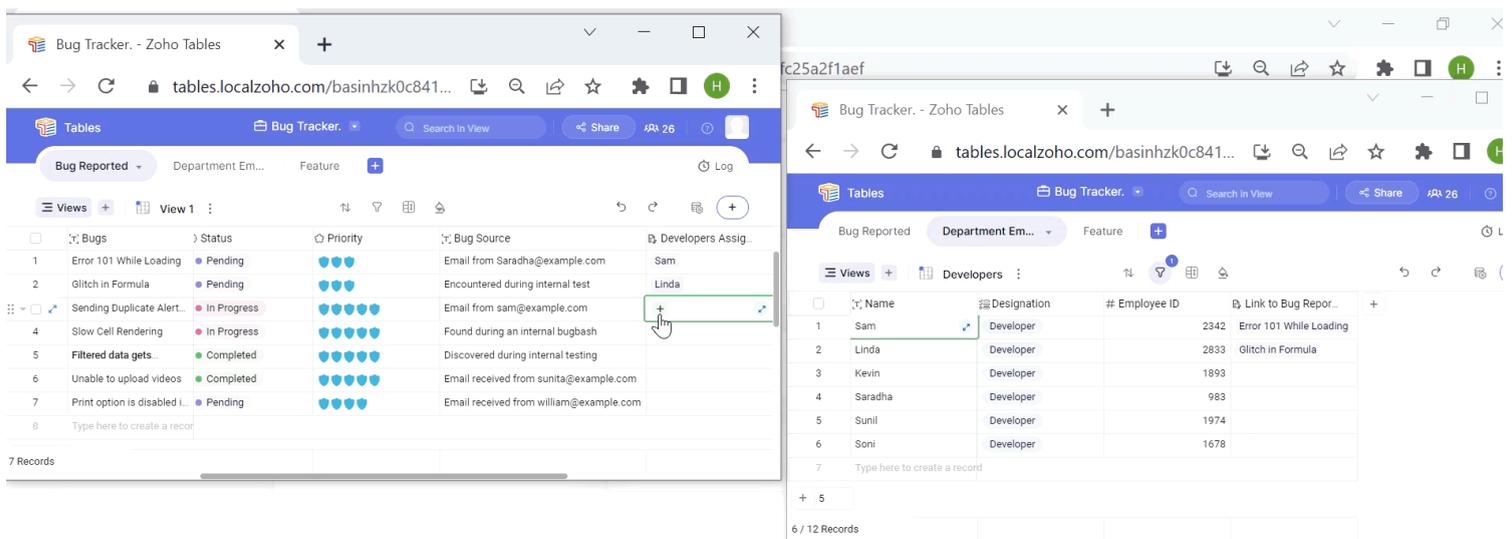


Exploit your Relationships

Real-Time Data Integration

The linked record fields maintain **real-time data integrity across the tables** in your workflows. Changes to any one of the linked records will update the information in all connected records instantly, enabling a **single source of truth** throughout the interface.

Example: The moment you assign a developer to the bug reported, the entry is instantly reflected on the other table where it's linked to, which **keeps your data accurate** and **eliminates duplicate entries**.



Restrict Link Selection to a View

The view feature in Zoho Tables supports creating a copy of your tabular data with a filtered condition without altering/disrupting the master tabular data. As a part of the linked records process, by enabling **Restrict link selection to a view**, users can limit the selection of records restricted to the data saved in a view. As a result, the **Link record picklist** will only display the records from the selected view to choose from.

This process is described in three stages as follows:

1. Enable Filtered View
2. Restrict Link Selection to a View
3. Access Records Limited to the Linked View

Example: Let's use the same bug tracker scenario to comprehend this feature better.

1. Enable Filtered View

Table 1 - Bugs Reported

Table 2 - Department Employees list (Includes developers and other functions)

In this case, as we need to assign the bugs to the developers, we have to create a view of Table 2 and **enable a filter in the designation field to filter only developers from the department employees list**. This filtered view is to be named as developers, i.e. **Table 2 - Department Employees & View - Developers**

Now that we have the list of developers saved as a separate view under Table No. 2, the next step is to enable restricted link selection to this view.

2. Restrict Link Selection to a View

Let's get back to the table to create link

Step 1- Select **link record field** from the list of fields available

Step 2- Choose a **table** to link to - (Department Employees)

Step 3- Choose a **display field** - from the Advanced option - (Developer Name).

Step 4- Enable the toggle option to **Restrict selection to a view**

Step 5 - Find the **View** (Developers)

Step 4 - Click on **create**

3. Access Records Limited to the Linked View

In the below GIF, after saving the table with a filtered condition as a separate view and restricting link selection, you can see only the records limited to the view "developers " under the table "department employees."

When you click on the + **icon** to link records, the **Link record picklist** will only display the records from the selected view "**developers**" to choose from.

#	Name	Designation	# Employee ID
1	Sam	Developer	2342
2	Linda	Developer	2033
3	Kevin	Developer	1893
4	John	Designer	2932
5	Rohit	Designer	1683
6	Saradha	Developer	983
7	William	Tester	2023
8	Gabel	Marketer	2093
9	Sunil	Developer	1974
10	Soni	Developer	1678
11	Arvind	Marketer	1928
12	Ashwin	Designer	2102
13	Type here to create a record		

Link Multiple Records

Zoho Tables supports **many-to-many relationships** which help you link multiple records in a single cell, i.e, **even if you already have one record linked to a cell, you will still see the + icon to pick as many records as you want** to serve your needs.

Below is an illustration of the list of courses offered by the university and the list of students enrolled in each program. For example, students may choose as many professional courses as they prefer & the university can admit as many students as they wish.

List of courses & Students Enrolled

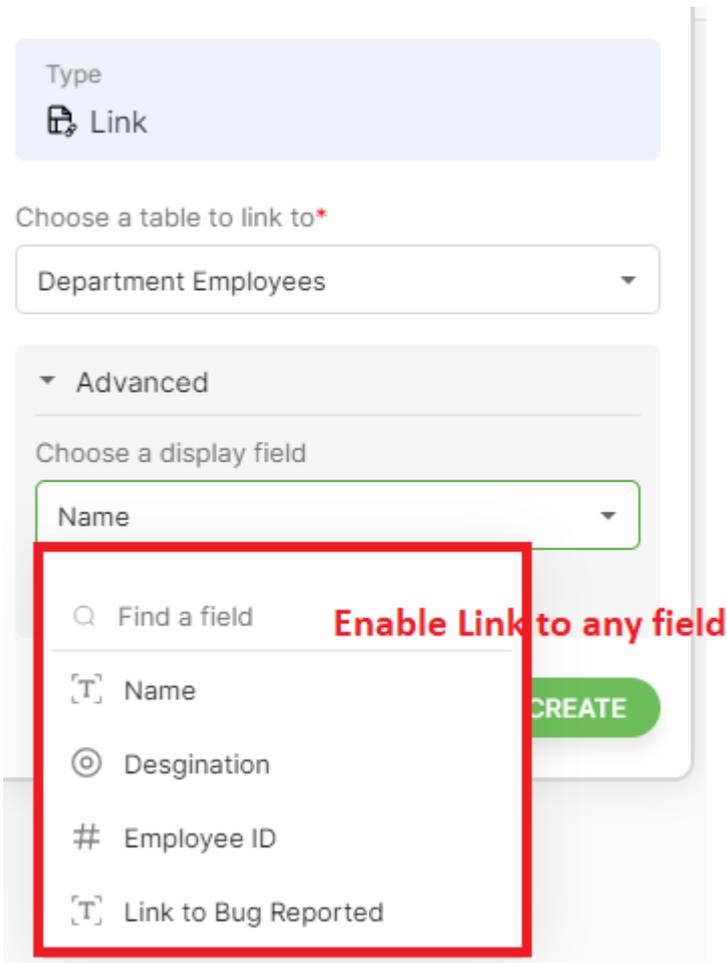
#	Course	Students
1	DataBase Management	Anita Naveen Sam
2	Security & Compliance	Sam Kalpana Naveen
3	Product Management	Naveen Tony
4	Digital Marketing	Naveen Anita
5	Internet of Things	Sam Tony Kalpana
6	Augmented Reality	Tony Naveen Kalpana
7	Virtual Reality	Kalpana Tony Naveen

List of Students & Courses Registered

#	Stude...	Departme...	Link to Products
1	Sam	IT	DataBase Management Internet of Things Security & Compliance
2	Anita	Robotics	DataBase Management Digital Marketing
3	Naveen	Mechatronics	DataBase Management Product Management Digital Marketing
4	Tony	Robotics	Product Management Augmented Reality Internet of Things Virtual Reality
5	Kalpana	IT	Internet of Things Augmented Reality Virtual Reality Security & Compliance

Link & Retrieve Records From Any Field of Your Choice

Linked record in Zoho Tables is designed exclusively for ease of use. A user can create links between records by **choosing any field of the other table as a display field** without restriction. It simplifies the process of linking records by allowing you to **connect easily and retrieve records** from a desired field.



With linked records, you can keep track of the relationships that are vital to your workflows without losing any information or encountering conflicts.