



# Lookup Field

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In business, sales, or team management, while managing a workflow, you may keep different lines of activities saved as individual tables. In various circumstances, it may require cross-referencing data from different tables. Bringing data from one linked table to another linked table is made easier with the Zoho Tables Lookup field.

You can use this field type to lookup data within the same table or across different tables.

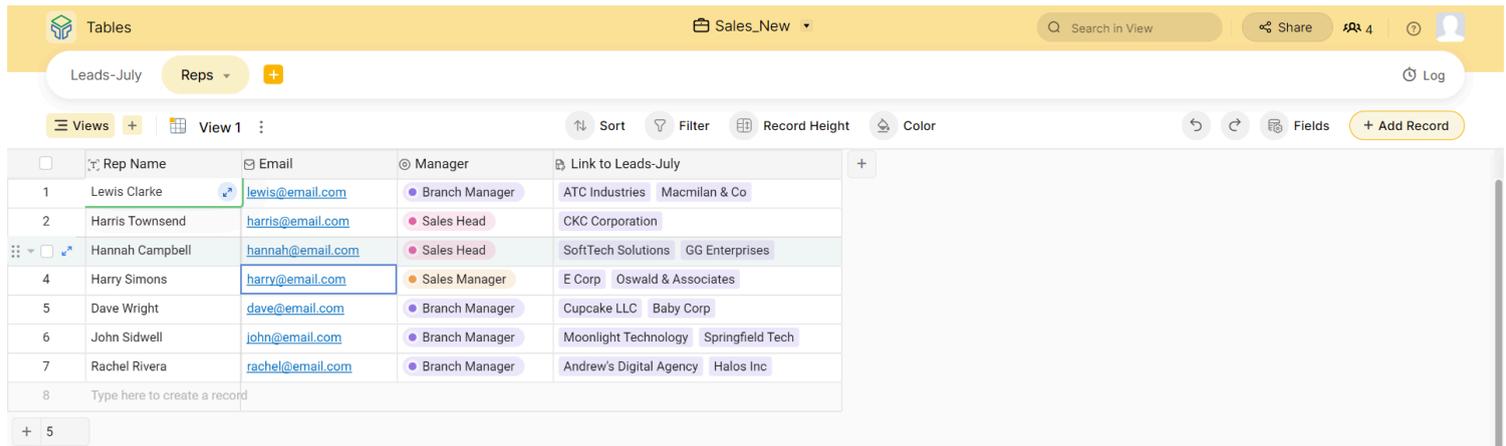
## When to use a lookup field?

Let's take the example of sales lead tracking.

**Table 1 - Leads-June:** shows the list of leads generated from various sources

	Company	Primary Contact	Email	Source of ...	Lead Type	Assigned To	Status	Pipeline	Closure Value	Link to Reps_copy
1	ATC Industries	Richard Miller	<a href="mailto:richie@email.com">richie@email.com</a>	LinkedIn	New	Lewis Clarke	Quote shared	\$ 20,000.00		
2	SoftTech Solutions	Chris Smith	<a href="mailto:chris@email.com">chris@email.com</a>	Newsletter	Existing Customer	Hannah Campbell	Closed - Won	\$ 65,800.00	\$ 64,250.00	
3	GG Enterprises	Mary Carter	<a href="mailto:mary@email.com">mary@email.com</a>	LinkedIn	New	Hannah Campbell	Evaluation	\$ 92,347.00		
4	CKC Corporation	Linda Jones	<a href="mailto:linda.jones@email.com">linda.jones@email.com</a>	LinkedIn	New	Harris Townsend	Negotiation	\$ 12,939.00		
5	Andrew's Digital Agency	Roger Davis	<a href="mailto:roger@email.com">roger@email.com</a>	Google Ads	New	Rachel Rivera	Quote shared	\$ 73,947.00		
6	Moonlight Technology	Liz Adams	<a href="mailto:liz@eail.com">liz@eail.com</a>	Facebook	New	John Sidwell	Quote shared	\$ 64,816.00		
7	Cupcake LLC	Rachel Greene	<a href="mailto:rachelg@email.com">rachelg@email.com</a>	Facebook	New	Dave Wright	Evaluation	\$ 91,270.00		
8	E Corp	Tom Fernandez	<a href="mailto:tom@email.com">tom@email.com</a>	Newsletter	Existing Customer	Harry Simons	Closed - Won	\$ 28,338.00	\$ 27,000.00	
9	Halos Inc	Henry Lee	<a href="mailto:henry@email.com">henry@email.com</a>	Facebook	New	Rachel Rivera	Evaluation	\$ 12,730.00		
10	Macmilan & Co	Jo Wilson	<a href="mailto:jowilson@email.com">jowilson@email.com</a>	LinkedIn	New	Lewis Clarke	Negotiation	\$ 19,738.00		
11	Oswald & Associates	Noah Clark	<a href="mailto:noah@email.com">noah@email.com</a>	Newsletter	Existing Customer	Harry Simons	Closed - Won	\$ 49,290.00	\$ 49,290.00	
12	Paper Boat Beverages	Mirinda Scott	<a href="mailto:mirinda@email.com">mirinda@email.com</a>	Newsletter	Existing Customer	Harry Simons	Closed - Won	\$ 39,740.00	\$ 39,700.00	
13	Baby Corp	Jennifer Hill	<a href="mailto:jenn@email.com">jenn@email.com</a>	Google Ads	New	Dave Wright	Quote shared	\$ 82,634.00		
14	Estell Talent Agency	Emily Casper	<a href="mailto:emily@email.com">emily@email.com</a>	Facebook	New	Lewis Clarke	Evaluation	\$ 77,927.00		
15	Springfield Tech	Stephen Young	<a href="mailto:stephen@email.com">stephen@email.com</a>	Newsletter	Existing Customer	John Sidwell	Closed - Won	\$ 91,273.00	\$ 90,200.00	
16	Type here to create a record									

**Table 2 - Reps:** shows the list of sales reps assigned to each lead generated.



Rep Name	Email	Manager	Link to Leads-July
1 Lewis Clarke	lewis@email.com	Branch Manager	ATC Industries Macmilan & Co
2 Harris Townsend	harris@email.com	Sales Head	CKC Corporation
Hannah Campbell	hannah@email.com	Sales Head	SoftTech Solutions GG Enterprises
4 Harry Simons	harry@email.com	Sales Manager	E Corp Oswald & Associates
5 Dave Wright	dave@email.com	Branch Manager	Cupcake LLC Baby Corp
6 John Sidwell	john@email.com	Branch Manager	Moonlight Technology Springfield Tech
7 Rachel Rivera	rachel@email.com	Branch Manager	Andrew's Digital Agency Halos Inc
8	Type here to create a record		

Suppose you're the head of sales, working on Table 2- details of the sales representatives, and would like to glimpse at the lead source that each salesperson is engaged in. You can enable the lookup field to retrieve that information from Table 1 - which holds the list of leads generated from various sources.

## How to add a lookup field ?

*Note: To use the lookup field, the tables need to be linked using the Link field.*

**A linked field lets the look-up field understand the path and based on the record selected in the link field, the lookup field retrieves data.**

Table 1, as illustrated above, contains the leads received from various sources.

Table 2, as illustrated above, has the list of the sales representatives and leads assigned.

**Step 1-** Choose where you want to add the lookup field. **This is the field where data to be pulled up from other tables.** Add a new field and choose **Lookup** from the list of available field types.

In this example, a lookup field is added to the Reps table to pull up the data from the Leads table, about the source of leads that are assigned to each representative.

Leads-July   Repts

Sort   Filter   Record Height   Color

Rep Name	Email	Manager	Link to Leads-July
1 Lewis Clarke	lewis@email.com	Branch Manager	ATC Industries   Macmilan & Co ...
2 Harris Townsend	harris@email.com	Sales Head	CKC Corporation
3 Hannah Campbell	hannah@email.com	Sales Head	SmartTech Solutions   GG Enterprises
4 Harry Simons	harry@email.com	Sales Manager	E Corp   Oswald & Assoc
5 Dave Wright	dave@email.com	Branch Manager	Cupcake LLC   Baby Corp
6 John Sidwell	john@email.com	Branch Manager	Moonlight Technology   S
7 Rachel Rivera	rachel@email.com	Branch Manager	Andrew's Digital Agency
8	Type here to create a record		

Fields: Link, Lookup, Collaborator, Email, Formula, Multi Select, Rollup, Single Select, URL

Lookup tooltip: Portal Logs link, Primary contact link, Lookup a field on linked records

This field shows the link between Table 1 and Table 2

**Step 2-** Choose the **link field**. If you have multiple linked fields, you will have an option to choose one of the link fields, to perform the look-up.

**Step 3 -** Choose the **field** from which you want to retrieve the data.

Sort   Filter   Record Height   Color

Type: Lookup

Choose a link field\*

Link to Leads-July

Choose a field to lookup

Source of Lead

CREATE

Choose the linked field from which you want to pull the data

Choose the field from which you want to pull the data

**Step 4 -** Click on **Create**.

The screenshot shows a Zoho CRM interface with a table named 'Leads-July'. The table has columns for 'Rep Name', 'Email', 'Manager', 'Link to Leads-July', and 'Source of Leads'. The 'Source of Leads' column is highlighted with a red box, and a red arrow points to it from a text box that reads: 'Lookup field shows the source of every lead that is assigned to each rep'.

Rep Name	Email	Manager	Link to Leads-July	Source of Leads
1 Lewis Clarke	lewis@email.com	Branch Manager	ATC Industries   Macmilan & Co ... +	LinkedIn   LinkedIn   Facebook
2 Harris Townsend	harris@email.com	Sales Head	CKC Corporation	LinkedIn
3 Hannah Campbell	hannah@email.com	Sales Head	SoftTech Solutions   GG Enterprises	Newsletter   LinkedIn
4 Harry Simons	harry@email.com	Sales Manager	E Corp   Oswald & Associates   Paper Boat Beverages	Newsletter   Newsletter   Newsletter
5 Dave Wright	dave@email.com	Branch Manager	Cupcake LLC   Baby Corp	Facebook   Google Ads
6 John Sidwell	john@email.com	Branch Manager	Moonlight Technology   Springfield Tech	Facebook   Newsletter
7 Rachel Rivera	rachel@email.com	Branch Manager	Andrew's Digital Agency   Halos Inc	Google Ads   Facebook
8	Type here to create a record			

In the above image, as we have placed a lookup field, we can now see the list of sources of the leads handled by individual sales reps. With lookup field, we are now free from switching between tables to view relevant information.

**You can add multiple lookup fields on the same table.**

*Note: A lookup field is read-only. It acts like a mirror in displaying the values of other fields, therefore cannot be edited.*

**The lookup field stays in sync.** If a change is made in the linked record, the associated linked record, and the lookup field connected with it will be updated automatically.

The lookup field acts like any other field, that we can create filters, sort, and even views based on it.