

AI TOOLS -

AI OCR

From a received document to information ready to work with in **Zoho**. AI OCR reads photos and PDF files, identifies the data your process needs, and turns it into structured information inside **Zoho CRM** or **Zoho Desk**.

Photo or PDF

→

Zoho CRM

Zoho Desk

CRM or Desk

Reading

Extraction

Update

DOCUMENTS TO DATA

When documents arrive, someone has to turn them into data

Forms, receipts, requests, and other documents can arrive as photos or PDF files attached to a ticket.

Even when the information is there, the team still needs to **open the file, locate the relevant data, and enter it into the system** before continuing the process.

As volume grows, this manual task consumes time and can delay the handling of each case.

AI OCR automates the step between the received document and the record the workflow needs.



Receive

Documents attached to the usual process.



Interpret

Relevant fields identified by the workflow.



Update

Data available inside Zoho.



STEP BY STEP

From file to record in Zoho

01

Receive the document

The user attaches a photo or PDF to the ticket as part of the usual process.

02

Read the information

AI OCR analyzes the document and identifies the fields the workflow needs.

03

Structure the data

The extracted information is no longer only inside the file and is organized into the corresponding fields.

04

Update Zoho

The data obtained is used to complete or update the corresponding record in Zoho CRM or Zoho Desk.

The team can continue working with the information directly from Zoho.

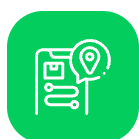
DOCUMENT AUTOMATION

Less manual load in document-based **processes**



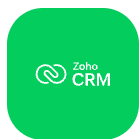
Avoid transcribing information

The required data is extracted directly from the received file.



Speed up processing

The record can be completed without manually reviewing and moving each data point.



Keep information inside the process

The extracted data remains available in CRM or Desk to continue the workflow.



Adapt to the fields you need

Extraction is configured according to the information required by each process.

USE CASES

Where it can be used

AI OCR is designed for processes where **received documents must become structured data** before work can continue.

For example:



Receiving forms



Processing requests



Documentation attached to tickets



Recording information sent in PDF



Capturing data from photos

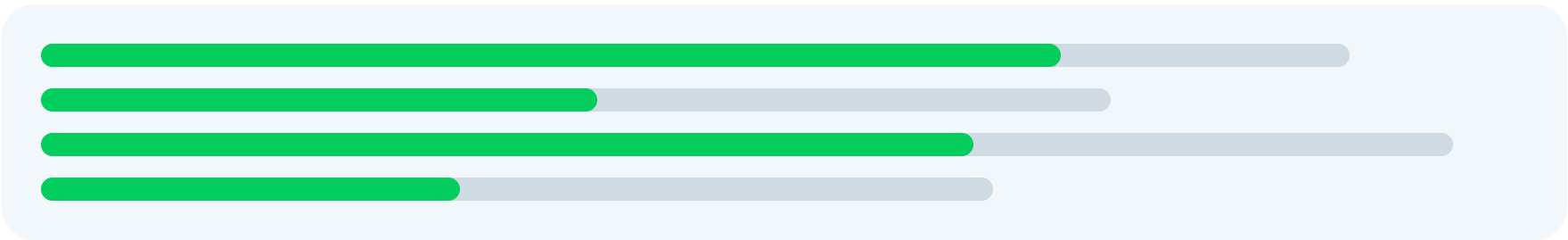


Document intake and validation processes

It is not only about reading a document

Traditional OCR

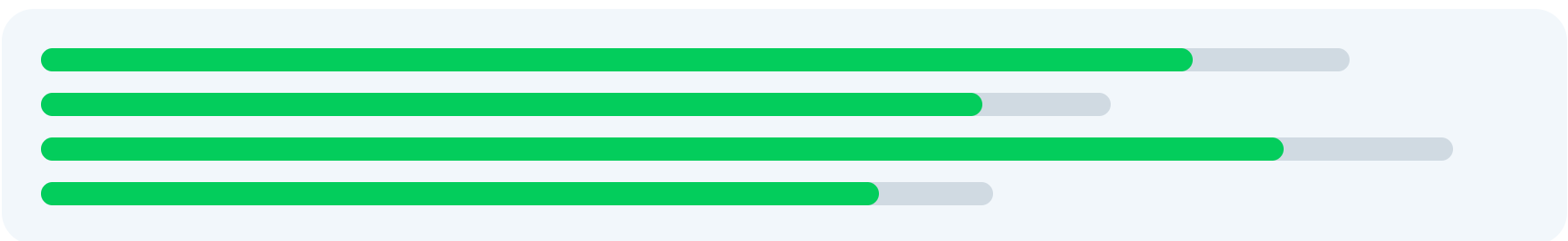
A traditional OCR can recognize the content of an image.



AI OCR oriented to the process

AI OCR is oriented toward using that information inside a process: it identifies the required fields and updates the corresponding record in Zoho.

The goal is for the received document not to create another manual data-entry task for the team.



IDEAL COMPANIES

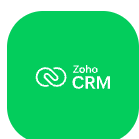
For organizations that need to turn documents into **usable fields**



Receive a frequent volume of photos or PDFs.



Manually move data from documents into Zoho.



Manage document-based processes from Zoho Desk or Zoho CRM.



Need to convert unstructured information into usable fields.



Want to speed up document intake and validation processes.

From document to process, without entering the **information** again

InterConnecta configures AI OCR according to the documents the organization receives, the data it needs to extract, and the fields that must be completed in **Zoho CRM** or **Zoho Desk**.

Does your team still open documents to manually copy their data into Zoho?

Talk to a specialist